MedRight
Home Care Scheduling System

Version 4.05+
Featuring Medicare Compliance
& SmartCheck Technology

User Manual

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Post Office Box 551, Springville NY 14141

SPECIAL NOTICE

Medical Necessity & ICD9 Data

It is strongly recommended that the CPT4/ICD9 Reference Report be reviewed for accuracy with respect to your laboratory's Medicare requirements. This information is utilized by ***MedRight*** when determining the medical necessity of Medicare orders. Contact Software Inventors if you require assistance to update this data.

Software Inventors makes no warranty (express or implied) with respect to the accuracy of the CPT4 and ICD9 data included with ***MedRight.***

Year 2000

Software Inventors has tested ***MedRight*** to verify its operation in the year 2000 and beyond. We have found the system to operate properly and produce accurate patient schedules. In addition, the vendor of the computer language in which ***MedRight*** is written has indicated that the system will operate properly through the year 2100.

Software Inventors, however, makes no warranty (express or implied) with respect to the accuracy of ***MedRight*** in the year 2000 or beyond. It is strongly recommended that you test the system's performance to ensure its proper operation and accuracy for your purpose.

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INTRODUCTION

The ***MedRight Home Care Scheduling System*** version 4.0+ is the most advanced ***MedRight*** patient scheduling system created to date! Complete with Medicare compliance features and our exclusive SmartCheck technology, version 4.0+ provides unparalleled ease-of-use and reliability.

Designed to provide the laboratory with a marketing and operational advantage in the homecare marketplace, the system is a proven patient management system which allows the laboratory's and home care client's professional staff to spend more time caring for patients by relieving them of tedious and error-prone paperwork.

MedRight provides the ability to record patient demographic, billing, and test order information. Once entered, the system accurately tracks and schedules each patient's laboratory tests. Printed test requisition forms and a variety of reports can be generated to assist the laboratory and home care client's staff in providing superior patient care.

Incorporating one of the industry's most sophisticated and efficient scheduling algorithms, this unique system can precisely match any testing pattern, regardless of complexity. In addition, the system minimizes special phlebotomy trips by scheduling tests, whenever possible, on normal phlebotomy days. The results are a streamlined laboratory operation, increased revenues, and minimized costs.

Used properly, the ***MedRight Home Care Scheduling System*** significantly improves the quality of patient care, minimizes patient discomfort, enhances quality assurance programs, and builds a successful and mutually beneficial relationship between the laboratory and home care client.

GETTING STARTED

First, familiarize yourself with the basic capabilities of the ***MedRight Home Care Scheduling System*** by reading through this manual.

In order to realize the maximum benefit from this powerful system, analyze the current manual operation and identify all of the tasks currently being performed by the staff. With ***MedRight***, some of these tasks may no longer be necessary, others may require major changes, while some will stay the same.

Try redesigning the operation from the ground up, drawing on the features and flexibility offered by the system. Like any new tool, simply 'shoe-horning' this system into the existing operation will be a frustrating experience with no real payoff.

Review the various reports available to the clients and identify their best use for your marketplace. Develop report generation schedules which meet the client's needs but do not needlessly burden the laboratory staff. Remember that inundating clients with paper or setting unrealistic performance requirements on the laboratory staff defeats the purpose of the system and frustrates all involved.

If possible, reports should be generated in a 'batch' mode for all clients. This will tremendously simplify the laboratory operations, but requires standardized reporting schedules for clients.

Review the system's capabilities and the laboratory's operations with the sales and customer service staff. Agree on areas where services may be tailored for clients, and under what circumstances such tailored services will be offered. Also identify areas where deviation from standard procedures will result in unacceptable laboratory workloads and costs.

OPERATIONAL OVERVIEW

The ***MedRight Home Care Scheduling System*** is a network-ready, multi-user system - allowing multiple workstations to maintain data or generate reports simultaneously. No processing occurs except under the control of the user and all patient data is directly maintainable, at any time.

Functions which require heavy user interaction, such as patient entry, are designed to provide fast response time. Likewise, complex and high-volume functions, such as requisition generation, can be performed in a 'batch' mode. This design approach frees laboratory personnel to attend to other tasks while the computer runs unattended.

All of ***MedRight's*** functions are grouped, by category, onto 2 easy-to-use menus. Commonly used functions appear on the main menu with system configuration functions on a secondary menu. Choosing a menu option is as simple as clicking on a menu button.

The system's exclusive SmartCheck technology constantly monitors data entry functions, ensuring that information is reasonable. Convenient on-screen prompts and help messages step the user through operating the functions, with a minimum of training.

USING THE SYSTEM

Installing ***MedRight***

MedRight version 4.0+ requires the following minimum system specifications:

Pentium processor
128mb RAM
20mb Hard Disk space
CD-ROM
Microsoft Windows 98, NT, ME, 2000, XP, or Vista

To install ***MedRight*** on your computer, follow these easy steps. At any time, should you encounter any problems or have questions, feel free to contact us at (716) 592-2397. We will be pleased to walk you through the installation process.

1. Insert the ***MedRight*** installation CD.

2. If the Setup program does not start automatically:
   Click on START, then RUN
   Enter the command x:SETUP ('x' is the CD drive).

3. Choose the default answers to the installation questions.

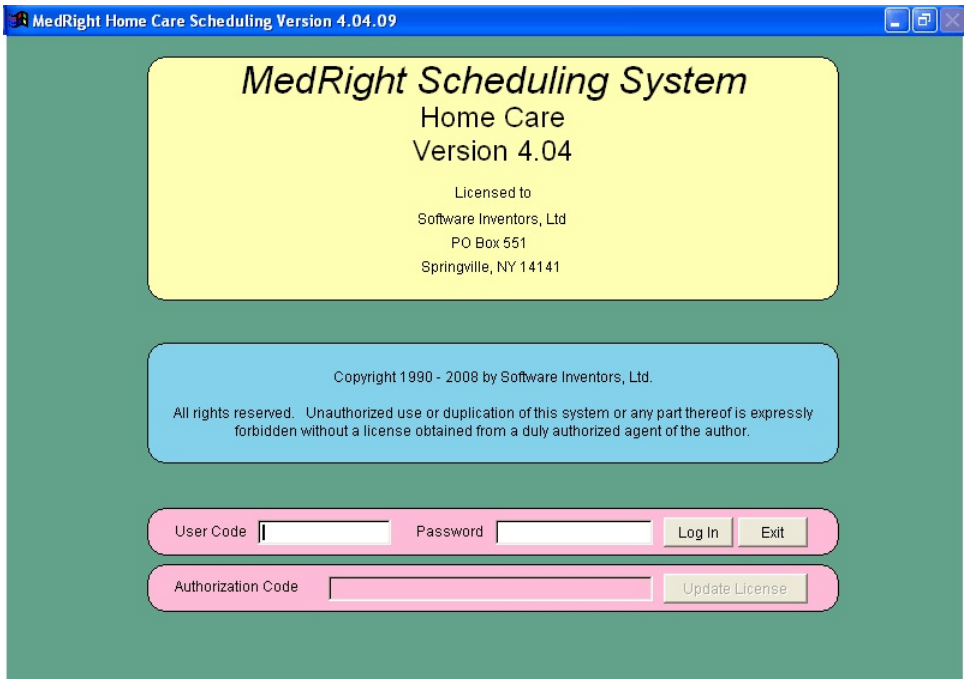
Starting ***MedRight***

Following installation, click the ***MedRight*** desktop icon. If the icon does not appear, ***MedRight*** may be started via Windows Explorer by executing the HCS40.EXE file located in the ***MedRight*** folder.

When the introductory ***MedRight*** screen appears, you will be asked to enter a username and password. Use the User Code & Password which was included with your shipment for this initial entry into the system.

IT IS STRONGLY RECOMMEND THAT THE PASSWORD SHIPPED WITH THE SYSTEM BE MODIFIED TO PREVENT UNAUTHORIZED ACCESS TO THE SYSTEM.

The system's Main Menu screen will now be displayed, and you're 'off & running'!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MedRight Scheduling System
Home Care
Version 4.04
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PO Box 551
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All rights reserved. Unauthorized use or duplication of this system or any part thereof is expressly forbidden without a license obtained from a duly authorized agent of the author.
User Code
Password
Log In
Exit
Authorization Code
Update License

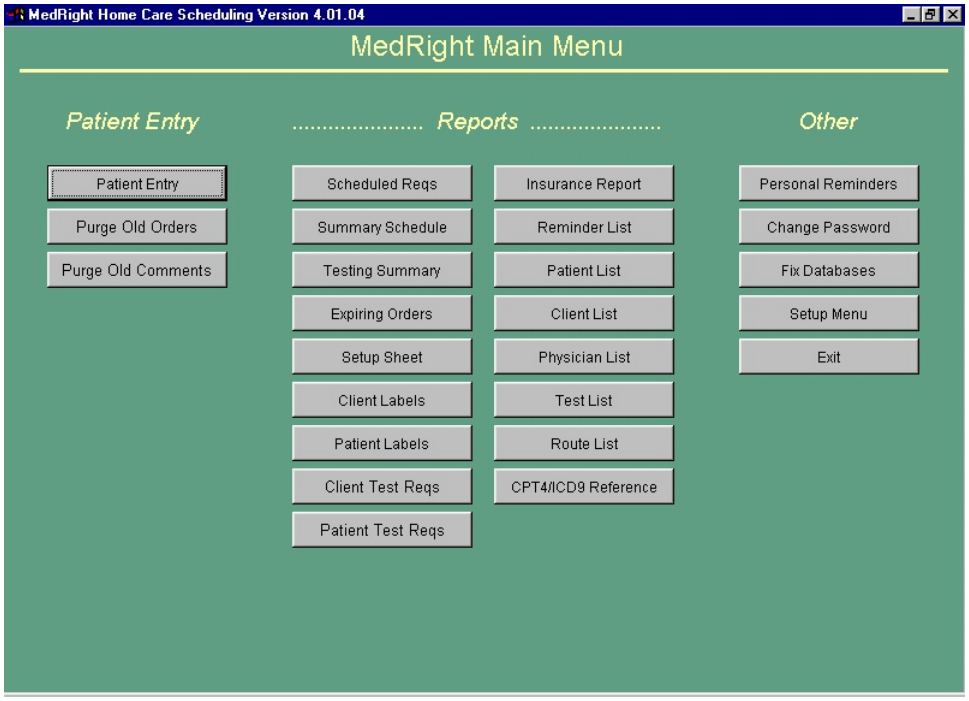
*Exiting **MedRight***

To exit ***MedRight,*** always choose the Exit option of ***MedRight's*** Main Menu.

Finding Patients

It is not necessary to know the correct or complete spelling of an individual's name in order to locate them. Type at least one letter at the Last Name prompt and click FIND. ***MedRight*** will then display the first alphabetical match.

Use the PREV and NEXT buttons to move alphabetically forward and backward through the patients. Choose the desired individual by clicking EDIT.



Alternately, patients may be located via their patient number. Either the full number, or a portion of the number may be entered. ***MedRight*** will then display the first patient found which matches the entry. Use the PREV and NEXT buttons to move numerically forward and backward through the patients.

For example, to find Robert Smith, any of the following methods may be used:

1. Enter 'S' at the last name prompt. ***MedRight*** will display the name of the first individual found in the database whose last name begins with 'S'. Use the down arrow key to find Robert Smith.

2. Enter 'SMI' at the last name prompt. ***MedRight*** will display the name of the first individual found in the database whose last name begins with 'SMI'. Use the up & down arrow key to find Robert Smith.

3. Enter 'SMITH' at the last name prompt. ***MedRight*** will display the name of the first 'SMITH' found in the database. Use the up & down arrow key to find Robert.

4. Enter 'SMITH' at the last name prompt and 'ROBERT' at the first name prompt. ***MedRight*** will display the name of the first 'ROBERT SMITH' found in the database.

5. Enter Robert Smith's patient number at the Patient # prompt.

Finding Clients, Physicians, Tests, and Routes

When changing client, physician, test or route information, it is not necessary to know the complete client number, physician name, test code or route code. Enter at least one letter of the number or code and press FIND. ***MedRight*** will then display the closest match on the screen.

Use the PREV and NEXT buttons to scroll forward and backward through the clients, physicians, tests or routes. Choose the desired entry by pressing EDIT.

Personal Reminders

The ***MedRight Home Care Scheduling System*** provides the ability to record various dates and related notes of which you would like to be reminded. Each time the ***MedRight*** main menu is activated, your personal reminder list is checked and an alarm displayed if any items are due or overdue.

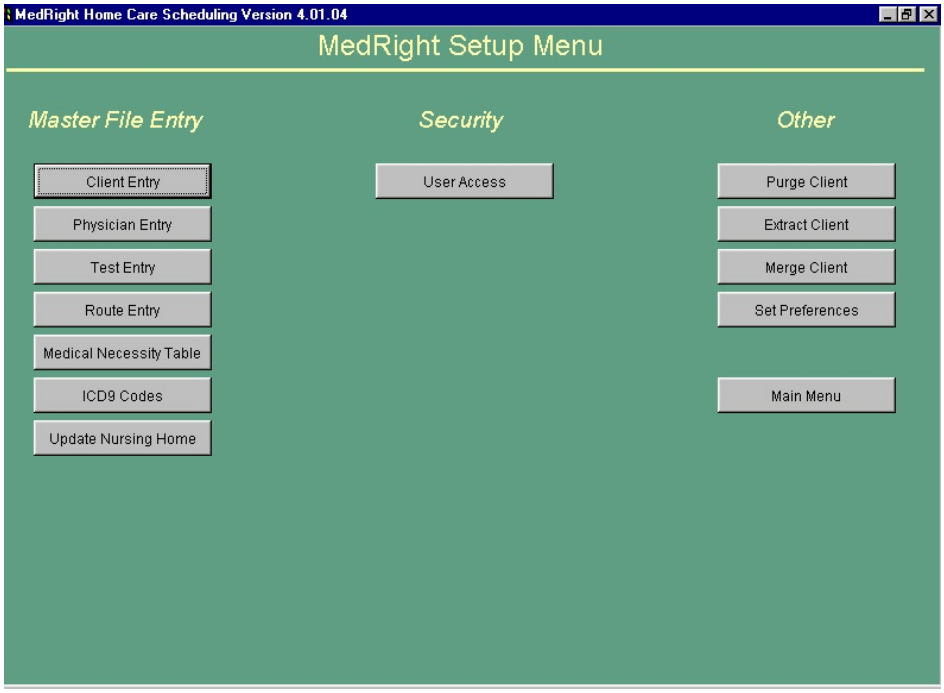
SETTING UP THE SYSTEM

Prior to entering any patient information into ***The MedRight Home Care Scheduling System***, the following items must be set up in the system's master files:

Client File

Enter each client's account number, name, and address. Optionally, two telephone numbers, a fax number, and up to 26 customized test codes may be entered.

No patient may be entered into the system for a client who does not appear in this file.



Test File

Enter the various laboratory tests. Required information includes the test code and name. In addition, fasting information and a note may be entered. If desired, tests may be grouped so that multiple requisitions are printed for the patient. This feature allows tests such as 4pm Glucose

to appear on requisitions separate from other tests being performed for the patient.

Phlebotomy Route List

Enter 1 or more phlebotomy routes. Every patient must be assigned to route, which is used by ***MedRight*** to sort reports.

Phlebotomy Route Preload List

This optional entry allows MedRight to automatically calculate the correct phlebotomy route for a patient, based on their zipcode.

Physician List

This optional entry allows the creation of a master list of physicians along with other information, which can be displayed during patient entry and maintenance.

Medical Necessity Table & ICD9 Lists

This table is used to determine the medical necessity of test orders for Medicare patients. Approximately 150,000 entries are contained on the ***MedRight*** installation CD. While ***MedRight's*** included medical necessity table is common to many regions, we recommend that you review these entries to ensure that they are accurate and complete for your situation.

User Access

Create individual user codes and passwords to limit access to the system's features.

Preferences

Form Specs

Enter the type of requisition, requisition summary, label, and testing summary format and sort order.

Draw Fees

Enter the draw and trip fees to be printed on each requisition.

Compliance Settings

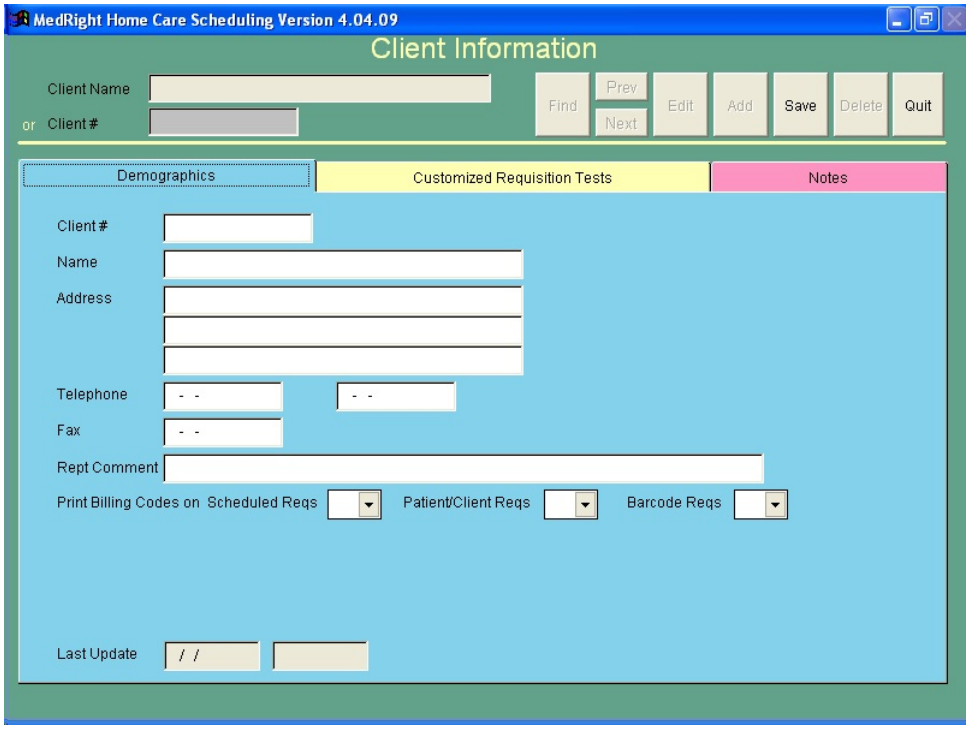
Enter the Medicare compliance settings to be used by the system when validating test orders.

Laboratory Telephone Number

Enter the desired telephone number for client calls.

ADD or CHANGE CLIENTS

Location Main Menu ➠
Setup Menu ➠
Client Entry



To locate a specific client, enter all or part of the client's name or number, then press FIND. Scroll through clients by pressing the PREV and NEXT buttons. If the last FIND was performed on a client name, PREV and NEXT scroll alphabetically, otherwise the scroll is by client number. Click ADD to add a new client.

Prompts		
	Client #	Enter the 10 character client number.
	Client Name	Enter the client name, up to 40 characters.
	Address	Enter the client's address, up to 30 characters. 3 address lines are provided.

Telephone #	Enter the telephone number. 2 telephone fields are provided.
Fax #	Enter the fax number.
Comment	Enter a client comment, up to 60 characters.
Print Billing Codes	Enter Y or N to indicate whether billing codes (entered on the Set Preferences screen) are to appear on requisitions for this client.
Barcode Reqs	Enter Y or N to indicate whether optional barcoded entries (provided by Software Inventors) are to appear on requisitions for this client.
Customized Requisition Tests	Enter up to 26 test codes which will appear on the client requisitions.
Client Notes	Enter an unlimited number of notes concerning client.

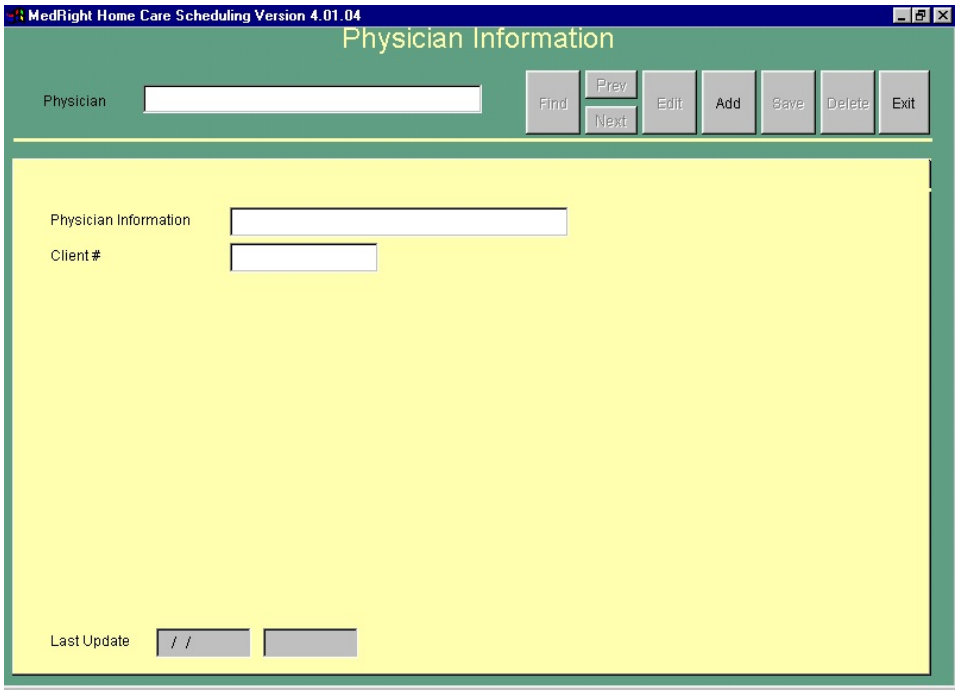
Notes

Client comments are automatically copied to the patient comment field when entering a new patient.

Client notes may be displayed from the patient and test order screens.

ADD or CHANGE PHYSICIAN INFORMATION

Location Main Menu ➠
Setup Menu ➠
Physician Entry



To locate a specific physician, enter all or part of the physician's name, then press FIND. Scroll through physicians by pressing the PREV and NEXT buttons. Click ADD to add a new physician.

Prompts

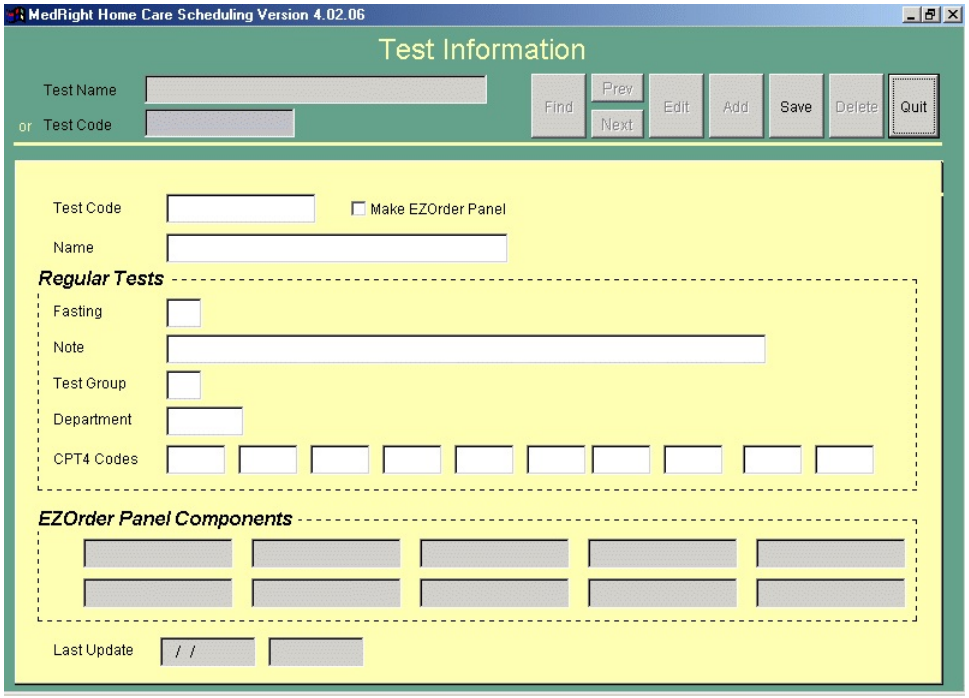
Physician Information	Enter the client name and other information, up to 50 characters.
Client #	Enter the 10 character client number.

Notes Physician entries may be displayed from the patient entry screen. However, unlike clients and tests, a physician DOES NOT need to be set up prior to entry on a patient screen.

Refer to 'Update Nursing Home' to update a ***MedRight Nursing Home Scheduling*** system with this system's physician information.

ADD or CHANGE TESTS

Location Main Menu ➠
Setup Menu ➠
Test Entry



To locate a specific test, enter all or part of the test's name or code, then press FIND. Scroll through tests by pressing the PREV and NEXT buttons. If the last FIND was performed on a test name, PREV and NEXT scroll alphabetically, otherwise the scroll is by test code. Click ADD to add a new test.

Prompts		
	Test Code	Enter the test code, up to 10 characters in length.
	Make EZOrder Panel	Check box to create an EZOrder Panel test. See Notes below for more information.
	Test Name	Enter the test name, up to 30 characters.

Fasting Specimen	Enter 'Y' if the test requires a fasting specimen, 'S' if fasting is suggested, or 'N' if no fasting is required. Optionally, enter the number of fasting hours required.
Test Note	Enter an optional note, up to 60 characters.
Test Group	Enter an optional test group, up to 1 character. When scheduled requisitions are printed, tests for a single patient are printed on separate requisition forms, according to their group.
CPT4 Codes	Enter up to 10 CPT4 codes associated with this test code.
EZOrder Panel Components	Enter up to 10 ‘regular’ test codes which define this EZOrder panel.

Notes

Test notes will be printed on requisitions and can be used to store specimen collection information or to identify the components of the test.

Use the test group feature to specify tests which should appear on a requisition form by themselves. For example, to cause ***MedRight*** to print 4pm Glucose tests onto a separate requisition from the patient's morning CBC test, enter a different group for the 4pm Glucose than that used for the CBC.

The CPT4 codes are used to associate a patient's test orders with the valid ICD9 codes, when determining whether the order complies with Medicare medical necessit rules.

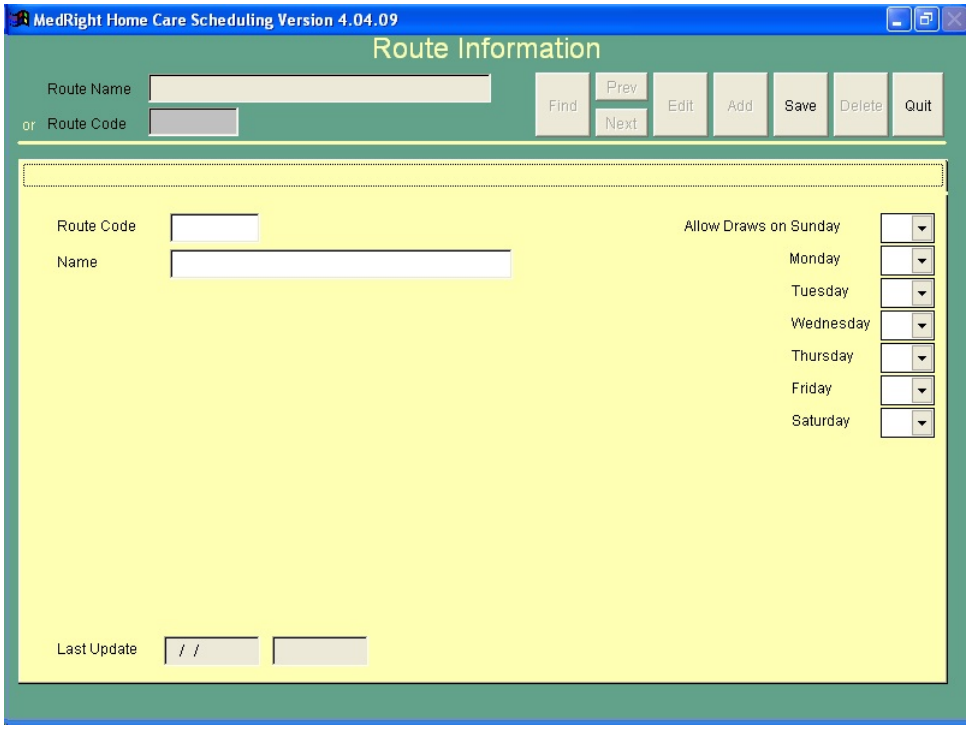
EZOrder panels are designed for the convenience of the laboratory when ordering multiple single tests. Create EZOrders for frequently ordered combinations of individually-ordered tests to streamline the laboratory's operations. When entering test orders for a patient, an order for the EZOrder panel 'explodes' into its component tests, with each component appearing as a separate test order. At no

time does the EZOrder test actually appear as an order for the patient.

Refer to ‘Update Nursing Home’ to update a ***MedRight Nursing Home Scheduling*** system with this system’s test information.

ADD or CHANGE PHLEBOTOMY ROUTES

Location Main Menu ➠
Setup Menu ➠
Route Entry



To locate a specific route, enter all or part of the route's name or code, then press FIND. Scroll through routes by pressing the PREV and NEXT buttons. If the last FIND was performed on a route name, PREV and NEXT scroll alphabetically, otherwise the scroll is by route code. Click ADD to add a new route.

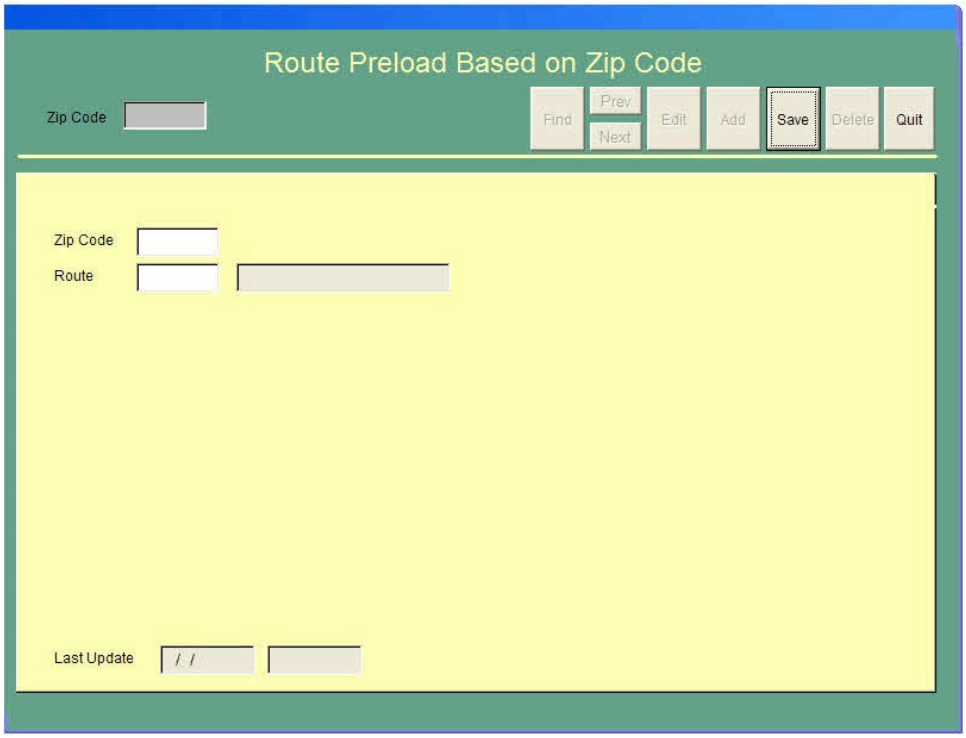
Prompts	Route Code	Enter the route code, up to 5 characters in length.
	Route Name	Enter the route name, up to 20 characters.
	Allow Draws on	For each day of the week, choose 'Y' if test orders are allowed to start on this

day or ‘N’ to prevent test orders from starting on this day. Choose ‘O’ to warn the operator that test orders should not start on this day but allow the restriction to be overridden.

Notes

ROUTE PRELOAD

Location Main Menu ➠
Setup Menu ➠
Route Preload Entry



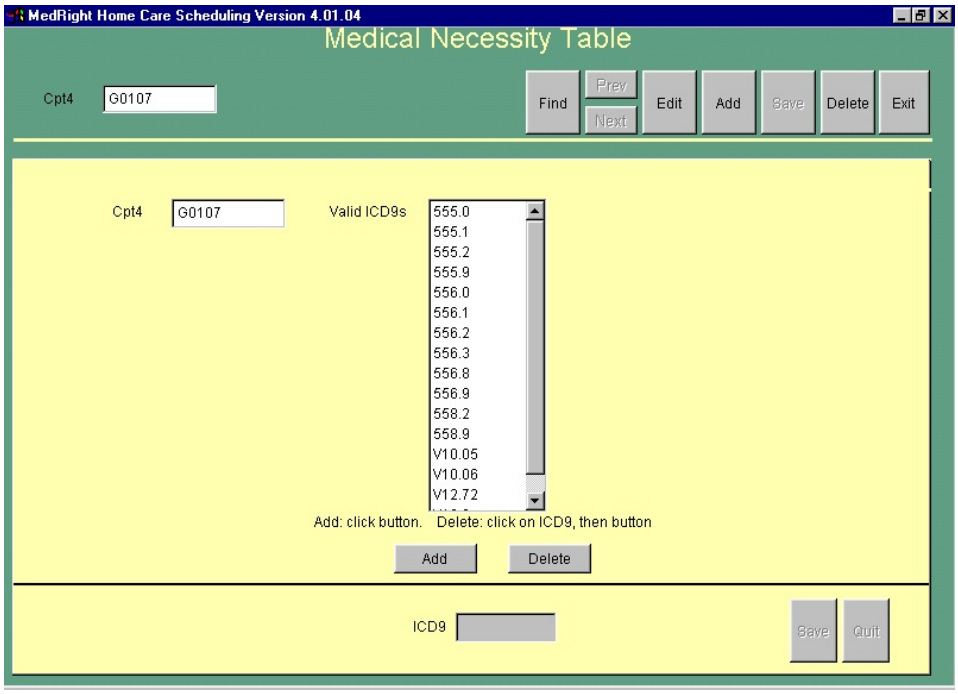
To locate a zip code, enter all or part of the zip code, then press FIND. Scroll through zip codes by pressing the PREV and NEXT buttons. Click ADD to add a new zip code.

Prompts	Zip Code	Enter the 5 character zip code.
	Route	Enter the route code to which the zip code is assigned.

Notes When entering patients or changing an existing patient's address, ***MedRight*** will automatically enter the correct Phlebotomy Route, based on the patient's zip code. The route calculated for the patient may be overwritten, if desired.

UPDATE MEDICAL NECESSITY TABLE

Location Main Menu ➠
Setup Menu ➠
Medical Necessity Table



To locate a specific CPT4 code, enter all or part of the code, then press FIND. Scroll through codes by pressing the PREV and NEXT buttons. Click ADD to add a new CPT4 code.

To add a new ICD9 for a CPT4, click ADD. To edit or delete an ICD9 code, click on the ICD9 code in the displayed list, then click the desired action (EDIT or DELETE).

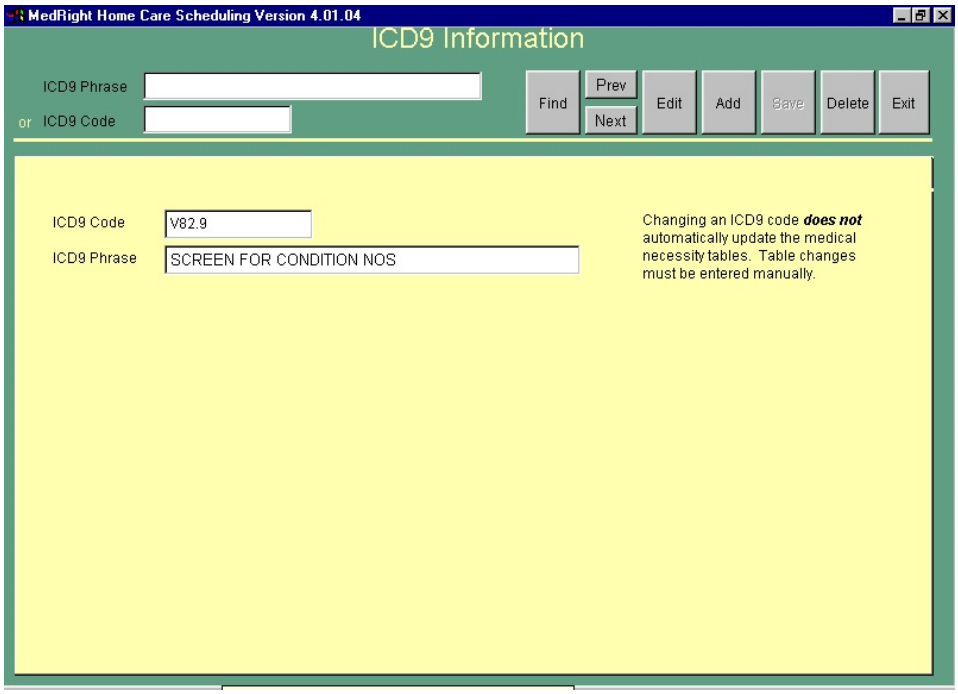
Prompts ICD9 — Enter the ICD9 code which is to be considered valid for the CPT4 code.

Notes While ***MedRight's*** included medical necessity table is common to many regions, we recommend that you review these entries to ensure that they are accurate and complete for your situation.

Refer to ‘Update Nursing Home’ to update a ***MedRight Nursing Home Scheduling*** system with this systems’ medical necessity information.

UPDATE VALID ICD9 CODES

Location Main Menu ➠
Setup Menu ➠
ICD9 Codes



To locate a specific ICD9 code, enter all or part of the ICD9 phrase or code, then press FIND. Scroll through ICD9 codes by pressing the PREV and NEXT buttons. If the last FIND was performed on an ICD9 phrase, PREV and NEXT scroll alphabetically, otherwise the scroll is by ICD9 code. Click ADD to add a new ICD9 code.

Prompts

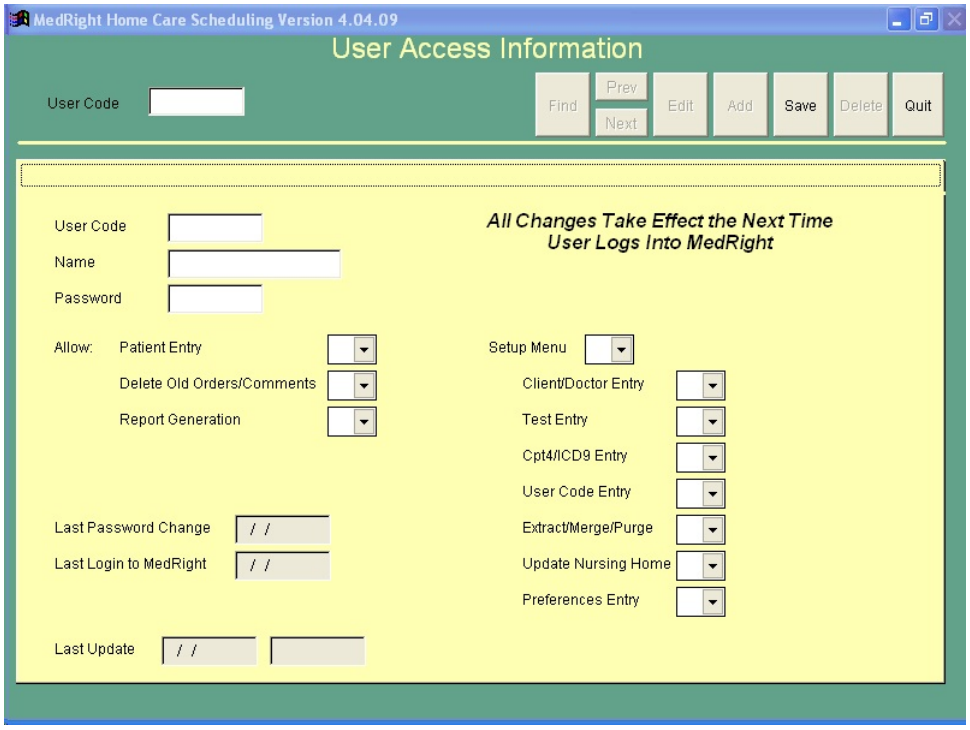
ICD9 Code	Enter the ICD9 code.
ICD9 Phrase	Enter the ICD9 phrase, up to 36 characters.

Notes When changing the ICD9 code associated with a phrase, ***MedRight*** will NOT automatically update the medical necessity table with the new code. Medical necessity tables updates must be performed for each CPT4 affected by the ICD9 code.

Refer to ‘Update Nursing Home’ to update a ***MedRight Nursing Home Scheduling*** system with this system’s ICD9 information.

ADD A NEW USER CODE

Location Main Menu ➠
Setup Menu ➠
User Access



To locate a specific usercode, enter all or part of the code, then press FIND. Scroll through users by pressing the PREV and NEXT buttons. Click ADD to add a new usercode.

Prompts

User Code	Enter the 3-6 character code, consisting of any characters on the keyboard.
User Name	Enter the user name, up to 15 characters.
Password	Enter a 3-6 character password, consisting of any characters on the keyboard. Note that alphabetic characters are not case-sensitive and automatically converted to upper-case.

Allow	Choose either ‘Y’ or ‘N’ if the user code is to be allowed to perform functions indicated by each of the categories listed: Patient Maintenance Deletion of Outdated Orders & Comments Report Generation Setup Menu Master File Maintenance Extract/Merge/Purge User Code Maintenance System Preferences

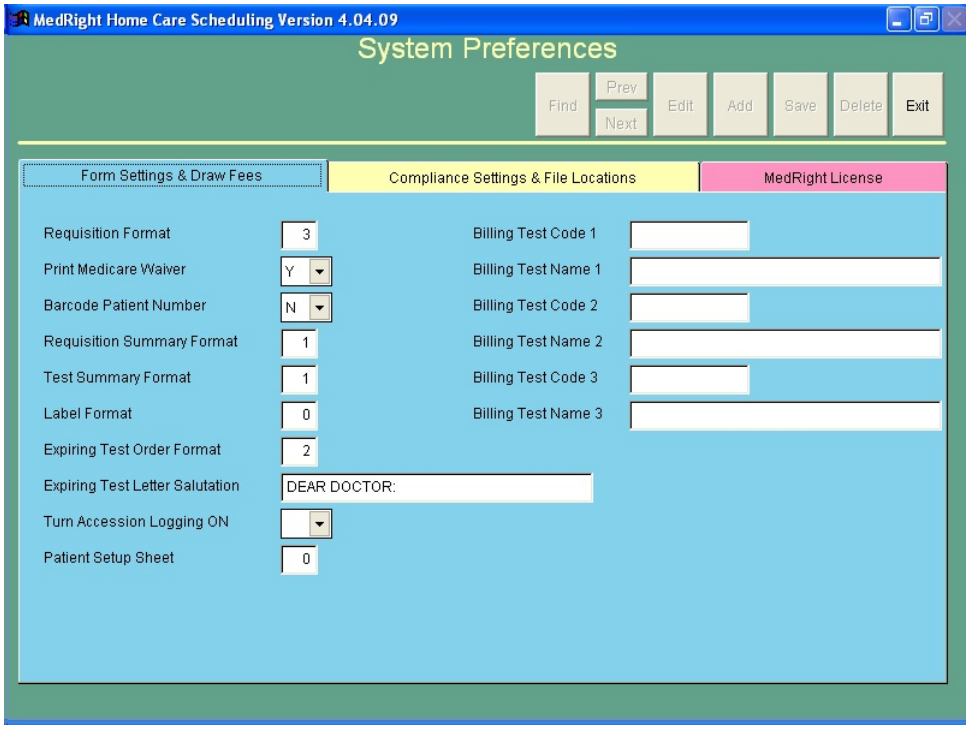
Notes It is recommended that each staff member have a unique user code and that the passwords for the ‘ADMIN’ and ‘ALL’ codes be changed.

With the exception of the password and user name, the ADMIN user code may not be modified.

IT IS STRONGLY RECOMMEND THAT THE PASSWORDS SHIPPED WITH THE SYSTEM BE MODIFIED TO PREVENT UNAUTHORIZED ACCESS TO THE SYSTEM.

ENTER or CHANGE FORM SPECIFICATIONS

Location Main Menu ➠
Setup Menu ➠
Set Preferences



Prompts

Requisition Format	Enter the number of the desired format.
Print Medicare Waiver	Choose 'Y' to automatically print the Medicare Beneficiary Waiver on Medicare patient requisitions. This option may not be available for customized requisition formats.
Barcode Patient Number	If enabled on your license, choose 'Y' to print a barcode on the requisition. This option may not be available for customized requisition formats.
Requisition Summary F...	Enter the number of the desired format.
Test Summary Format	Enter the number of the desired format.

Label Format	Enter the number of the desired format.
Expiring Test Order F...	Enter 1 for the report format, 2 for the letter format.
Letter Salutation	Enter the phrase to be used at the start of Expiring test order letters
Turn Accession Logging	Choose 'Y' if this system is to be used in support of a patient service center to track daily requisitions printed.
Patient Setup Sheet	Enter the number of the desired format.

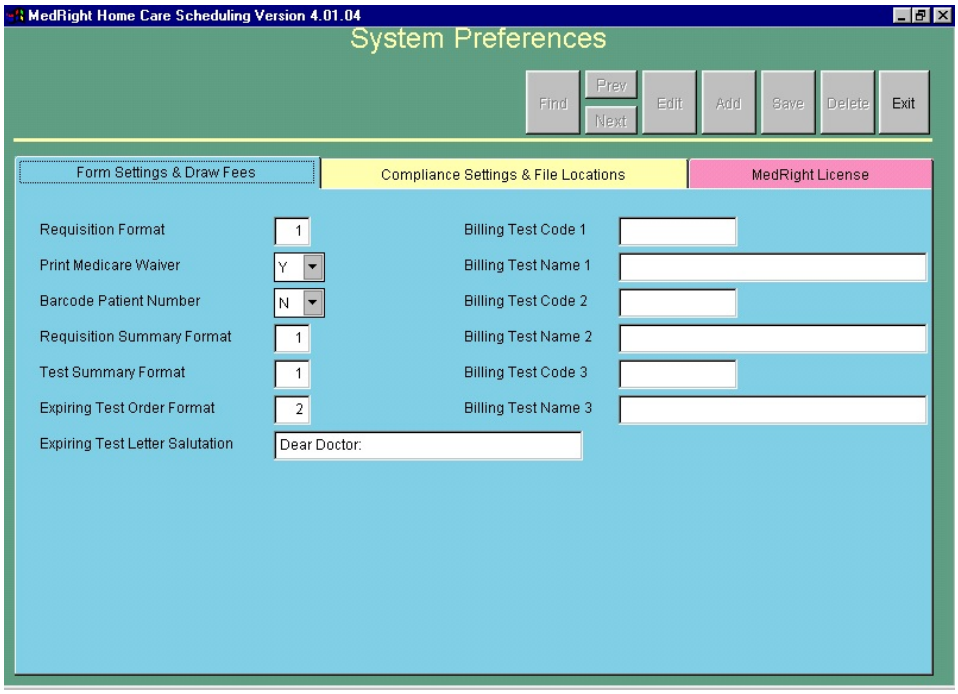
Notes

Contact Software Inventors for information on available report formats, as these are updated frequently. We recommend that you print samples of the various report formats and sort orders to determine the most appropriate option for your clients.

Settings are saved automatically when the EXIT button is pressed.

ENTER or CHANGE REQUISITION DRAW FEES

Location Main Menu ➠
Setup Menu ➠
Set Preferences



Prompts

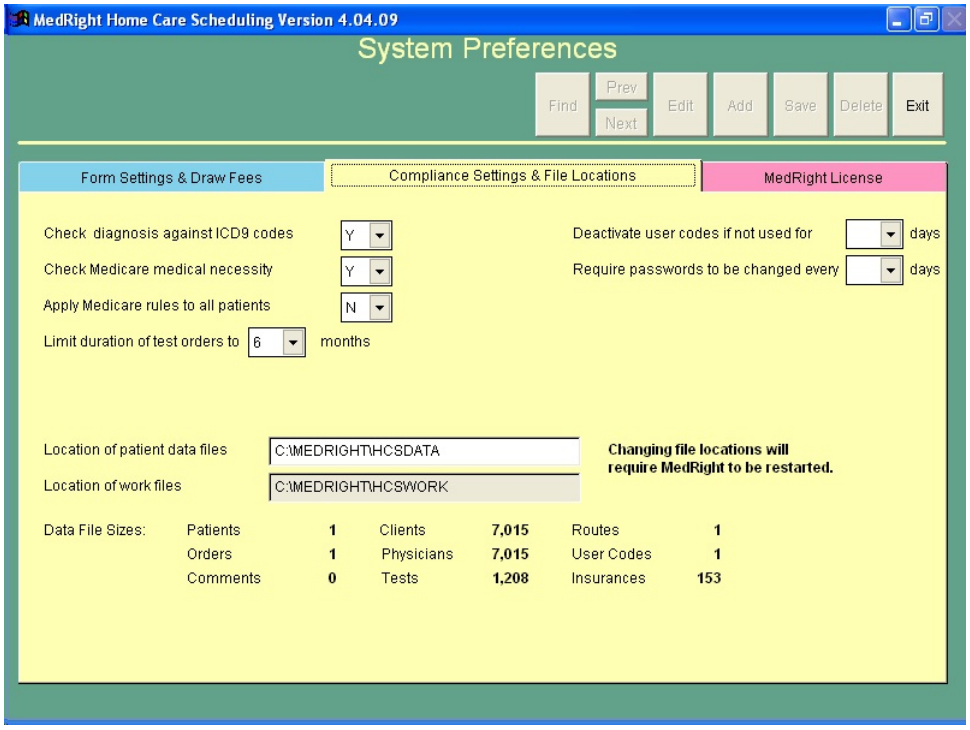
Code	Enter draw fee test code, up to 10 characters.
Name	Enter draw fee name associated with code, up to 30 characters.

Notes Draw fees are printed on all requisitions.

Settings are saved automatically when the EXIT button is pressed.

ENTER or CHANGE COMPLIANCE SETTINGS

Location Main Menu ➠
Setup Menu ➠
Set Preferences



Prompts

Check Diagnosis...	Choose 'Y' if the system is to check the validity of ICD9 codes for test orders.
Check Medicare...	Choose 'Y' if the system is to verify the medical necessity of Medicare orders.
Apply Medicare Rules To All Patients	Choose 'Y' if the system is to verify medical necessity regardless of insurance type.
ICD9 Codes to be... with	Choose 'Y' if ICD9 codes will be entered a decimal point or N to enter ICD9 codes without decimal points.

Limit Duration of...	Enter the maximum number of months for which standing orders may be entered, either 6 or 12.
Deactivate User Codes...	Enter the number of days of non-use after which usercodes will be automatically deactivated.
Require Passwords	Enter the number of days after which users will be required to update their password.

Notes Settings are saved automatically when the EXIT button is pressed.

It is recommended that the data file location fields not be changed without consultation with Software Inventors.

PATIENT & TEST ORDER ENTRY

The ***MedRight Home Care Scheduling System*** stores demographic (ex. name, birth date), billing (insurance), and test order information on patients.

Since all of a patient's information may not be available to the laboratory at the same time, billing and test order information may be entered separately from the demographic information.

To set up a patient, the following must be known:

Patient Number (typically, Social Security Number)
Patient Name
Gender
Attending Physician

Take caution to avoid entering the same patient under 2 different patient numbers. This can easily occur if the home care client is prone to mix-ups and sends 2 copies of the patient's paperwork to the laboratory. ***MedRight's*** exclusive SmartCheck technology can notify you of patients with similar names, birth date, and gender.

Test orders should be entered exactly as indicated by the client. There is no need to 'translate' orders, such as changing a monthly CBC to every 4 weeks. ***MedRight*** is flexible enough to handle any type of order requested by the patient's physician, and should be entered as indicated to maintain a clean audit trail.

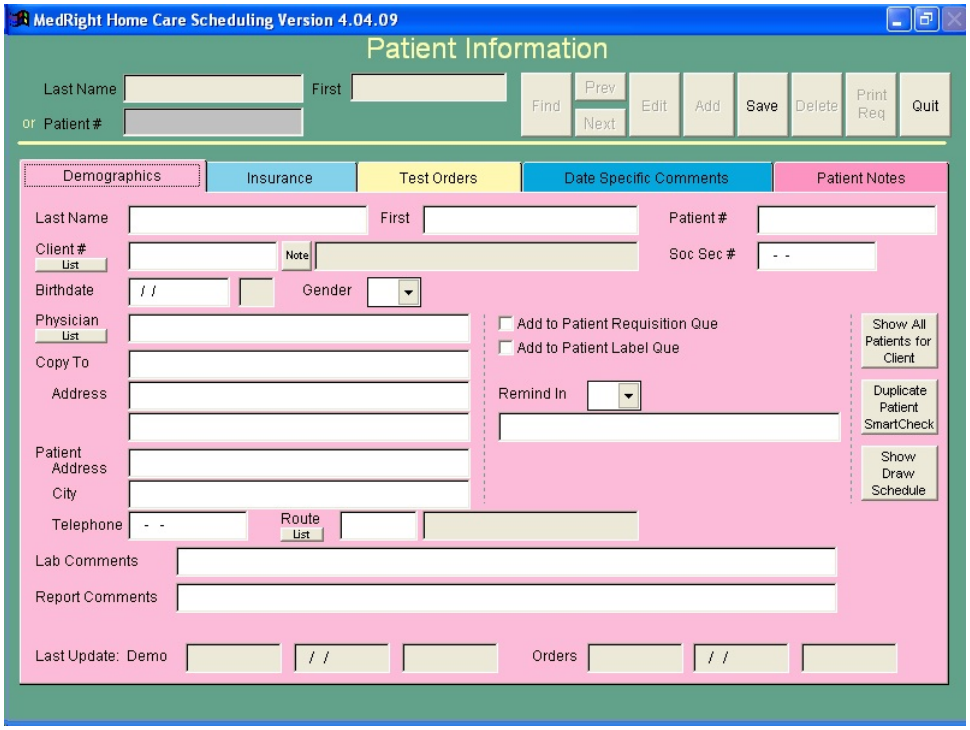
The ***MedRight Home Care Scheduling System*** can produce reports covering any period of time in the past or future. The ability to produce historical reports can be valuable to clients as a means of monitoring their in-house quality assurance / risk management activities.

Historical reporting is not possible if patient test orders are deleted from the computer when the order is discontinued by the physician. Therefore, if historical reporting is to be offered, do not delete test orders for patients. Rather, indicate the appropriate 'End Date' for the test order. Likewise, if the schedule frequency of a test order is changed, do not change the frequency within the system. Place an 'End Date' on the old order and enter a new one with the new frequency.

In this way the ***MedRight Home Care Scheduling System*** always 'knows' the past test order pattern for the patient and can produce accurate historical reports for the clients.

ADD or CHANGE PATIENTS
Billing and Demographic Information

Location Main Menu ➠
Patient Entry



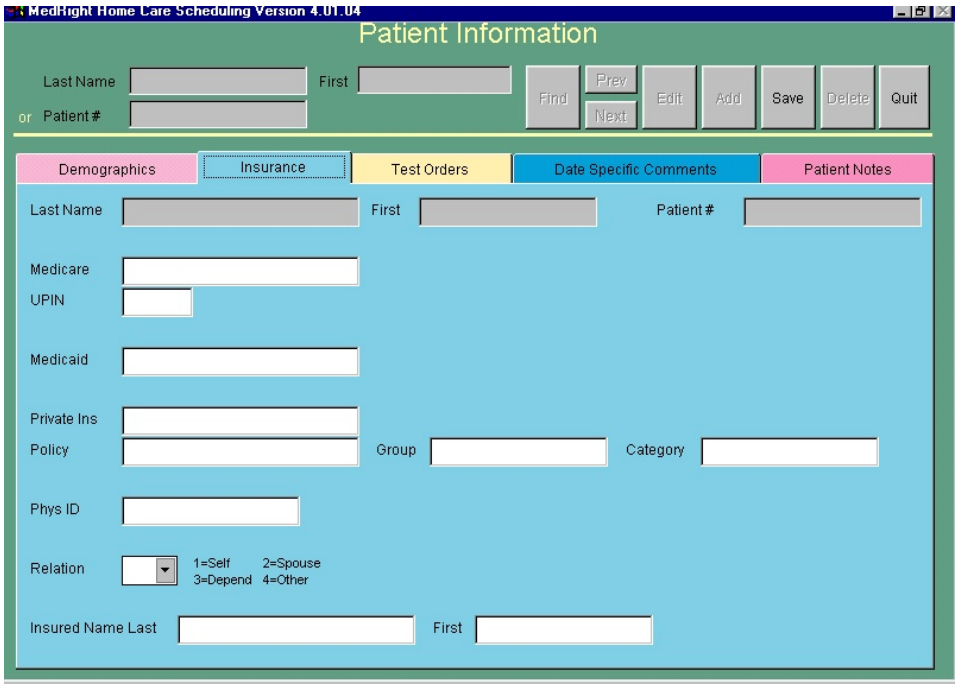
To locate a specific patient, enter all or part of the patient's name or code, then press FIND. Scroll through patients by pressing the PREV and NEXT buttons. If the last FIND was performed on a patient name, PREV and NEXT scroll alphabetically, otherwise the scroll is by patient code. Click ADD to add a new patient. Click DELETE to remove a patient from the system.

Prompts

Last Name	Enter the patient's last name, up to 20 characters.
First Name	Enter the patient's first name, up to 15 characters.
Patient #	Enter a unique combination of letters and numbers to identify this patient, up to 10 characters.

Client #	Enter the 10 character client number.
Soc Sec #	Enter the patient's Social Security Number, if desired.
Gender	Enter 'F' for female or 'M' for male.
Birth Date	Enter the patient's date of birth. If earlier than 1900, enter the 4 digit year (ie. 1892).
Physician	Enter the patient's physician name, up to 30 characters.
Copy to Doctor	Enter any physician who is also to receive copies of the patient's test results. Up to 30 characters.
Copy to Address	Enter the address of the Copy To physician, using 2 lines, up to 30 characters per line.
Patient Address	Enter the street address and city of the patient, up to 30 characters each.
Patient Telephone	Enter the telephone number of the patient.
Route	Enter the phlebotomy route to which the patient is assigned.
Reminder Note	Enter a reminder note, up to 30 characters.
Lab Comments	Enter phlebotomy notes, up to 75 characters. These appear on patient requisitions.
Report Comments	Enter notes, up to 75 characters, to be printed on the laboratory results report.
Add to Requisition Que	When printing patient unscheduled requisition, an option exists to include only queued patients. Check to include this patient in the que.

Add to Label Que	When printing patient labels, an option exists to include only queued patients. Check to include this patient in the que.
Reminder Month	Enter the number corresponding to the month for which a reminder should be printed. Ex 1 = January
Medicare #	Enter the patient's Medicare Id number, up to 14 characters.
UPIN #	Enter the attending physician's UPIN number, up to 6 characters.



Medicaid #	Enter the patient's Medicaid Id number, up to 20 characters.
Private	Enter the name of the patient's private insurance company, up to 20 characters. A second private insurance field is provided. This field holds up to 60 characters.
Policy #	Enter the patient's private insurance policy number, up to 15 characters.

Group #	Enter the patient's private insurance group number, up to 15 characters.
Category #	Enter the patient's category number, up to 15 characters.
NPI/Phys ID #	Enter the license number of the attending physician, up to 15 characters.
Relation	Choose ’1' if the patient is the insured, ‘2' if the patient is the insured's spouse, ‘3' if the patient is the insured's child, or ‘4' for any other relationship.
Insured Name Last	Enter the last name of the insured party, up to 20 characters.
Insured Name First	Enter the first name of the insured party, up to 15 characters.

Notes

The ‘Show All Patients for Client’ button will display a list of patients existing in the database for the specified client.

The ‘Duplicate Patient SmartCheck’ button displays a list of patients in the database for the specified client having similar sounding names and the same birth date. Enter the patient name, client, and birth date prior to running SmartCheck.

The ‘Show Draw Schedule’ button displays a list of scheduled draw dates for the patient. The date range displayed covers the previous 2 months and future 6 months.

The ‘Note’ button displays any notes entered for the client on the client entry screen.

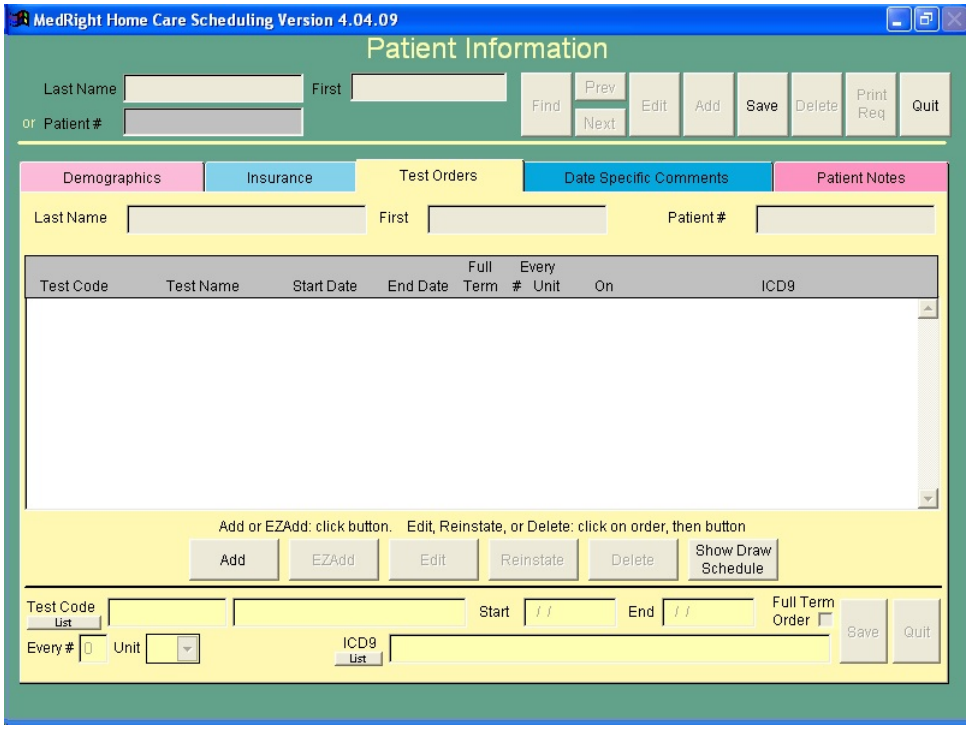
If a comment was entered on the client entry screen, it will be preloaded into the Report Comments field when adding a new patient.

If a Medicare # is entered for the patient, requisitions printed for that patient will include an 'Advanced Beneficiary Waiver Notice', if that option was chosen in the 'Form Specs' option of the Setup Menu.

The Reminder Month and Note fields may be used to track a patient's anniversary date.

ADD or CHANGE PATIENTS
Test Orders

Location Main Menu ➠
Patient Entry



To locate a specific patient, enter all or part of the patient's name or code, then press FIND. Scroll through patients by pressing the PREV and NEXT buttons. If the last FIND was performed on a patient name, PREV and NEXT scroll alphabetically, otherwise the scroll is by patient code.

To add a new order, click ADD. To edit, reinstate, or delete a specific test order, click on the order in the displayed list, then click the desired action (EDIT, REINSTATE, DELETE).

The EZADD option is designed to facilitate entry of multiple test orders with the same starting & ending dates, cycle, and diagnosis. When this option if chosen, ***MedRight*** preloads these fields based on the most recently added order for the patient.

Prompts

Test Code	Enter the code of the test to be performed.
Start Date	Enter the first date on which the test is to be performed.
End Date	Enter the date on which the test order is to be stopped.
Full Term Order	Check this box if the order is to be treated as a maximum length order, even though the end date is less than 6 or 12 months from the start date.
Every #, Unit	These 2 fields define the frequency with which the test is to be performed. The cycle # indicates how cycle units are to pass between tests. The cycle unit indicates the time period. Valid cycle units are: D Daily W Weekly W+ Weekly M Monthly Y Yearly T 1 Time Order The W+ cycle is used to enter weekly cycle orders which are to be performed on multiple days of the week. When selected, the user is prompted to indicate the days of the week on which the order is to be drawn. ***MedRight*** uses this information to automatically create multiple weekly test order records for the patient. Examples:

To schedule a test	Enter #	Unit
Daily	1	D
Every 3 days	3	D
Weekly	1	W

Every 2 weeks	2	W
Every 2 months	2	M
Every year	1	Y
One time only	1	T
Every 2 weeks on Mon & Thurs	2	W+ M Th

ICD9 — Enter one or more ICD9 codes to support the test order, separated by a space. Up to 60 characters may be entered. If no diagnosis is known, leave blank.

Notes

The 'Show Draw Schedule' button displays a list of scheduled draw dates for the patient. The date range displayed covers the previous 2 months and future 6 months.
Enter the Every # and Unit to correspond EXACTLY to the physician orders. Do not 'interpret' the orders since this destroys the audit trail and places the laboratory and client at risk.

A test entered with monthly ('1M') frequency is not the same as one scheduled every 4 weeks ('4W'). A '1M' test is scheduled 12 times per year while a '4W' test is scheduled 13 times.

Only tests with an Every Unit of 'D', 'W' or 'T' may have a start date during the 5th week of a month.

The End Date will be preloaded, based on the settings in the 'Compliance Settings' option.

Entry of ICD9 codes is optional. However, if an entry is made, the system will validate the entries to ensure they are valid ICD9 codes. Further, if the system has been instructed to do so, the medical necessity of the test order will be validated for Medicare patients.

To discard an addition or change, click QUIT before completing the test order line.

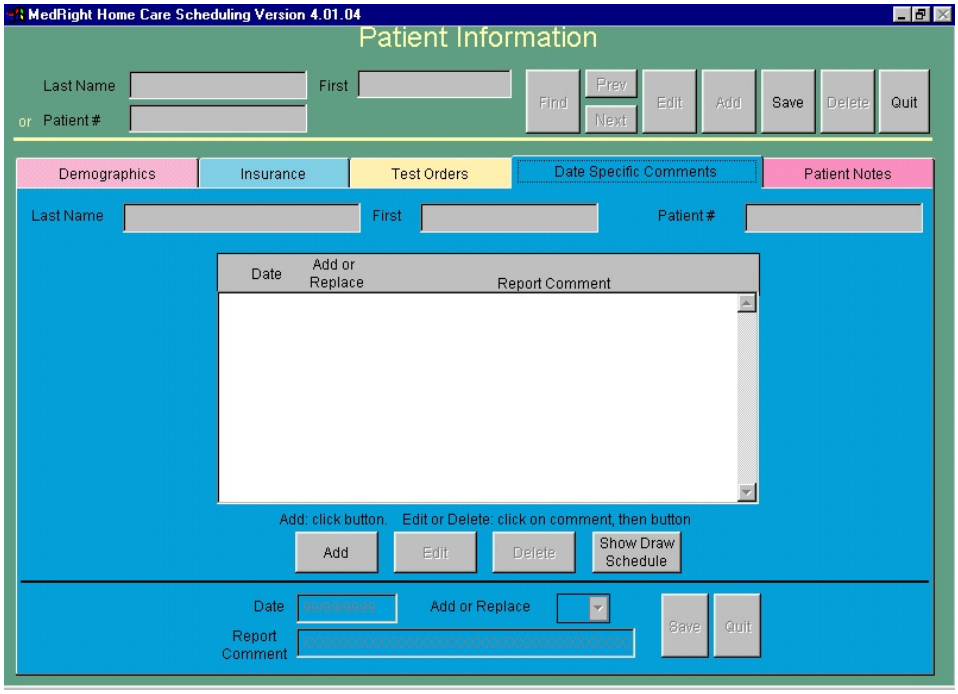
It is recommended that test orders not be deleted, unless entered by accident. Rather, enter an 'End Date' for the order. Once a test is deleted, the system no longer 'remembers' that it existed. Therefore, any reports which show the patient's historical test schedule will be inaccurate.

Likewise, it is recommended that test orders cycles not be changed, unless entered by accident. If the physician changes the frequency with which a test is to be performed, enter an 'End Date' for the existing order and then add a new order with the new cycle. This ensures the ability to produce an accurate historical test schedule and maintains an accurate audit trail.

When ordering an EZOrder Panel, the order 'explodes' into the panel’s component tests, with each component appearing as a separate test order. At no time does the EZOrder test actually appear as an order for the patient.

ADD or CHANGE PATIENTS
Date Specific Comments

Location Main Menu ➠
Patient Entry



To locate a specific patient, enter all or part of the patient's name or code, then press FIND. Scroll through patients by pressing the PREV and NEXT buttons. If the last FIND was performed on a patient name, PREV and NEXT scroll alphabetically, otherwise the scroll is by patient code.

To add a new date-specific comment, click ADD. To edit or delete a specific comment, click on the comment in the displayed list, then click the desired action (EDIT, DELETE).

Prompts	Date	Enter the date on which the comment is to appear on the patient's requisition.
	Add or Replace	Choose 'A' if this comment is to appear on the patient requisition along with the

		comment entered with the patient demographic information. Choose 'R' if this comment is to appear instead of the comment entered with the patient demographic information
	Comment	Enter the comment phrase, up to 60 characters.

.

Notes

This feature allows the 'generic' patient comment appearing on the patient demographic screen to be replaced or enhanced on the specified date.

Date-specific comments only appear on scheduled test requisitions.

Ensure that the date entered is an actual test date for the patient. ***MedRight*** does not check to ensure that a requisition is scheduled to be printed for this date.

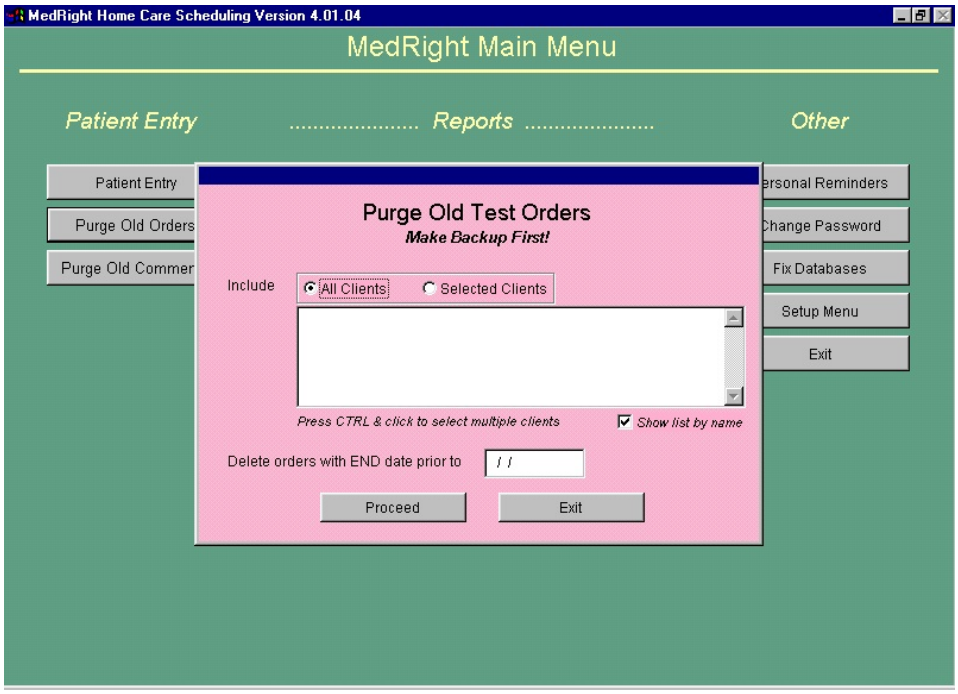
The ‘Show Draw Schedule’ button displays a list of scheduled draw dates for the patient. The date range displayed covers the previous 2 months and future 6 months.

Enter the Every # and Unit to correspond EXACTLY to the physician orders. Do not ‘interpret’ the orders since this destroys the audit trail and places the laboratory and client at risk.

Only 1 date-specific comment may be entered for a specific date.

DELETE OUTDATED TEST ORDERS

Location Main Menu ➠
Delete Old Orders



Prompts

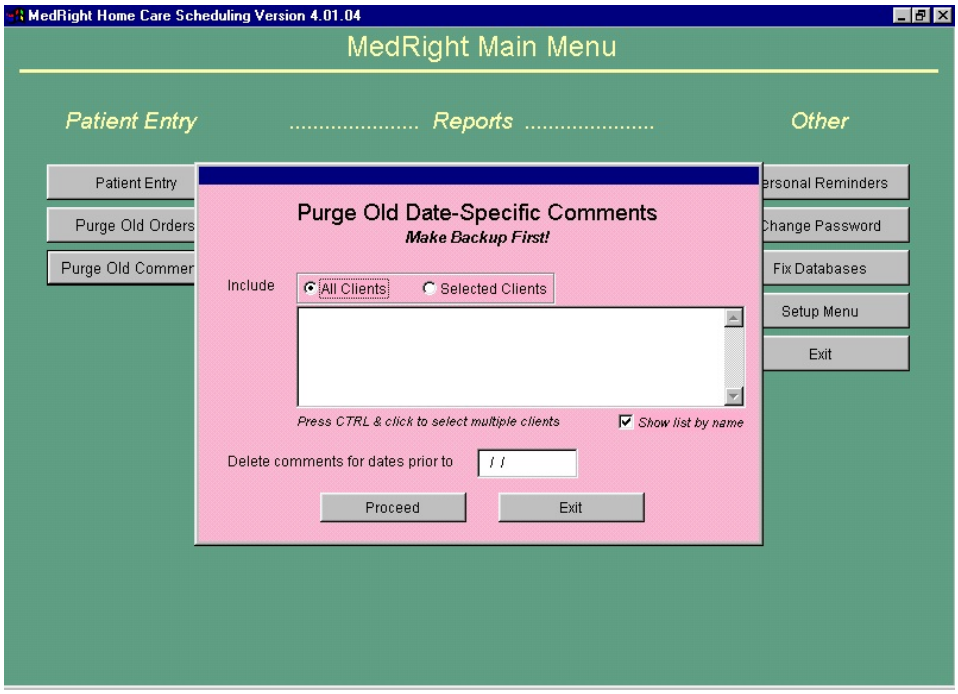
All or Selected Clients	If only patient orders for specific clients are to be deleted, choose 'Selected Clients' and highlight one or more desired clients.
Delete orders with END DATE prior to	Enter the date to be used in identifying orders considered outdated. This date is matched against the End Date entered for each patient test order.

Notes Once deleted, orders cannot be 'recovered'. Ensure that the correct End Date and Client information is entered.

IT IS STRONGLY RECOMMENDED THAT A ` OF THE SYSTEM BE MADE PRIOR TO DELETING OLD TEST ORDERS.

DELETE OUTDATED DATE-SPECIFIC COMMENTS

Location Main Menu ➠
Delete Old Comments



Prompts

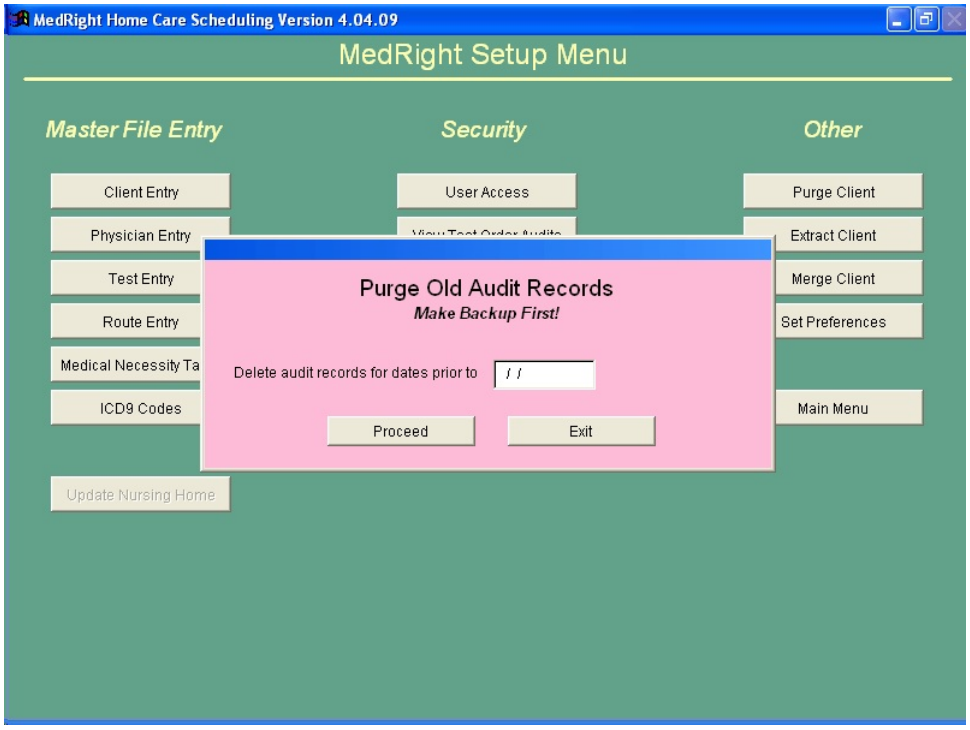
All or Selected Clients	If only comments for specific clients are to be deleted, choose 'Selected Clients' and highlight one or more desired clients.
Delete comments for dates prior to	Enter the date to be used in identifying comments considered outdated. This date is matched against the date entered for each patient date-specific comments.

Notes Once deleted, comments cannot be 'recovered'. Ensure that the correct Date and Client information is entered.

IT IS STRONGLY RECOMMENDED THAT A BACKUP OF THE SYSTEM BE MADE PRIOR TO DELETING OLD COMMENTS.

DELETE OUTDATED AUDIT RECORDS

Location Main Menu ➠
Setup Menu ➠
Purge Old Audits



Prompts

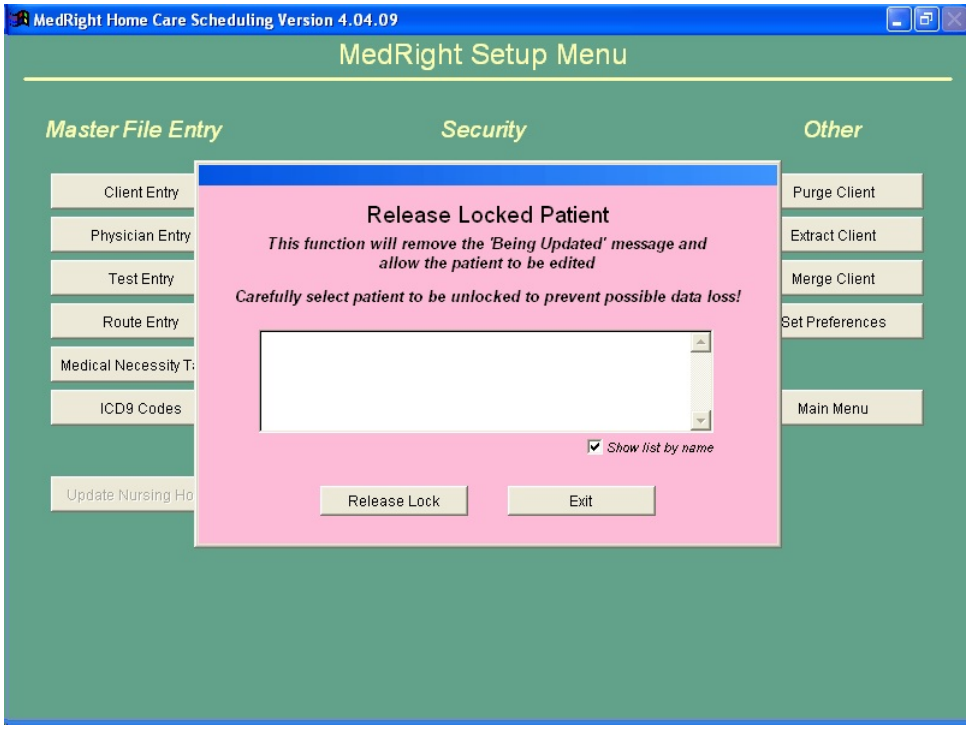
Delete audit records...	Enter the date to be used in identifying audit records considered outdated. This date is matched against the date on which the audit record was created by the system.

Notes Once deleted, audit records cannot be 'recovered'. Ensure that the correct Date is entered.

IT IS STRONGLY RECOMMENDED THAT A BACKUP OF THE SYSTEM BE MADE PRIOR TO DELETING OLD AUDIT RECORDS.

RELEASE LOCKED PATIENT

Location Main Menu ➠
Setup Menu ➠
Release Locked Patient



Prompts Patient — Select the patient to be released.

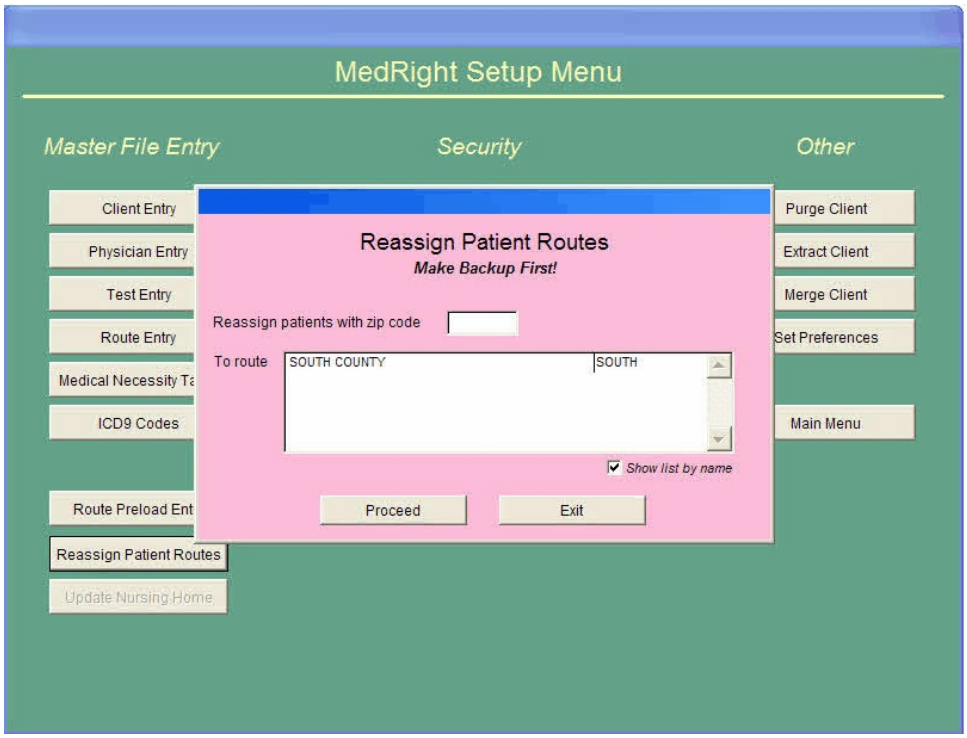
Notes When a user edits a patient record, the system automatically 'lock' the patient to prevent other users from accessing the patient. The lock is automatically released when the updated patient information is saved.

In rare situations a patient's lock may not be released. This is generally due to power failures, hardware issues, or if the Windows security settings automatically log a user out of the system for non-use. This function is used to manually release the lock.

THIS FUNCTION SHOULD BE USED RARELY. TO AVOID ACCIDENTAL LOSS OF THE PATIENT'S INFORMATION, ENSURE THAT THE PATIENT IS NOT ACTUALLY BEING UPDATED BY A USER PRIOR TO RELEASING THE LOCK.

REASSIGN PATIENT ROUTES

Location Main Menu ➠
Setup Menu ➠
Reassign Patient Routes



Prompts

Reassign Patients With Zip Code	Enter the zip code of the patients to be assigned to a different route.
To Route	Select the phlebotomy route to which patients with the zip code are to be assigned.

Notes When the Proceed button is clicked, ***MedRight*** will scan every patient address. For every patient where the specified zip code is found, that patient's route will be changed to the one selected.

IT IS STRONGLY RECOMMENDED THAT A BACKUP OF THE SYSTEM BE MADE PRIOR TO DELETING OLD AUDIT RECORDS.

REPORTS

The ***MedRight Home Care Scheduling System*** produces a variety of useful operational reports for both the home care client and laboratory.

Scheduled Test Requisitions - A plain paper requisition form identifying the tests to be drawn on a specific patient. Requisitions are sorted alphabetically within phlebotomy route allowing for easy distribution to phlebotomists.

Requisition Summary Report - A concise report showing all patients and test orders for a specified day or range of dates. Designed as a companion report for patient requisitions. Optionally, space can be provided at the bottom of each page for 'last minute' physician orders. This report can also serve as the phlebotomy draw log by having the phlebotomist initial draws performed.

Testing Summary Report - A concise report showing each patient's test and scheduled draw dates, arranged chronologically by patient.

Expiring Test Orders Report - An invaluable report showing all patient with test orders due to expire within a specified range of dates. Also available in a letter format.

Patient Reminder List - Provides a list of patients whose reminder month matches that requested. This report can be used to identify the anniversary month of patients along with a reminder note.

Patient Setup Sheet - A 'single page' report for each patient showing the demographic and test order information. This report is particularly useful when reviewing patient entries for accuracy. In addition, by printing this report for only patients whose information has been updated, this report serves as a convenient method of confirming patient changes with the client.

Patient Labels - Patient labels for use on generic client requisitions or specimen collection tubes.

Patient Requisitions - Plain paper requisitions which contain the patient's demographic and billing information. No scheduled test orders are shown, however the client's customized tests appear.

Client Requisitions - Plain paper requisitions which contain the client's name, address, and customized tests.

Insurance Report - Prints a list of patients and their insurance information for a single client or multiple clients.

Patient List - Provides a list of patients for a single client or all clients. This report can be used to identify patients with a specific test code ordered, a specific physician, or insurance entries

Client List - A list of all clients in the system.

Test List - A list of all tests in the system.

Route List - A list of phlebotomy routes in the system.

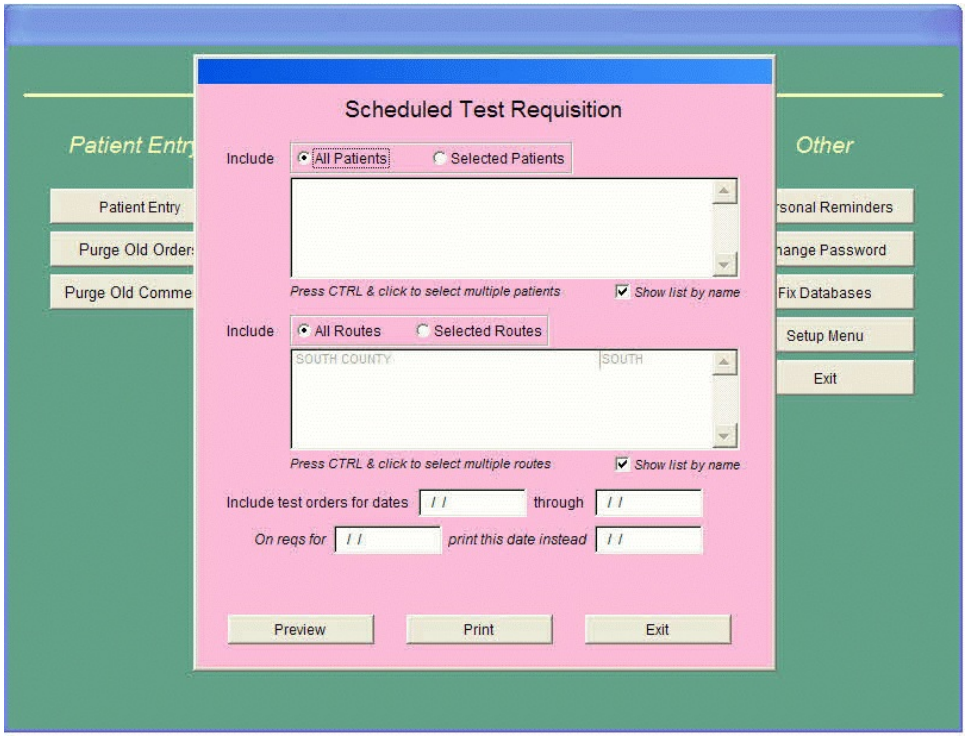
Physician List - A list of all physicians in the system.

CPT4/ICD9 Cross Reference - Provides a cross reference report of all CPT4 codes and their associated Medicare medical necessity ICD9 codes. May also be printed to all ICD9 codes, identifying their associated CPT4 codes

MedRight reports can be generated for any period of time (past or future) and can be reproduced as often as required. Additionally, any report can be previewed on the screen, allowing the option to select only specific pages for printing.

PATIENT REQUISITIONS
Scheduled Tests

Location Main Menu ➠
Scheduled Requisitions



Prompts

All or Selected Patients	If only specific patients are to be printed, choose 'Selected Patients' and highlight one or more desired patients.
All or Selected Routes	If only specific phlebotomy routes are to be printed, choose 'Selected Routes' and highlight one or more desired routes.
Include Test Orders for Dates	Enter the first and last dates for which requisitions are to be printed.
On Reqs for ... Print This Date Instead	To print a substitute date for a specific date, enter the date to be changed and the substitute date. This allows requisitions which fall on a holiday to be

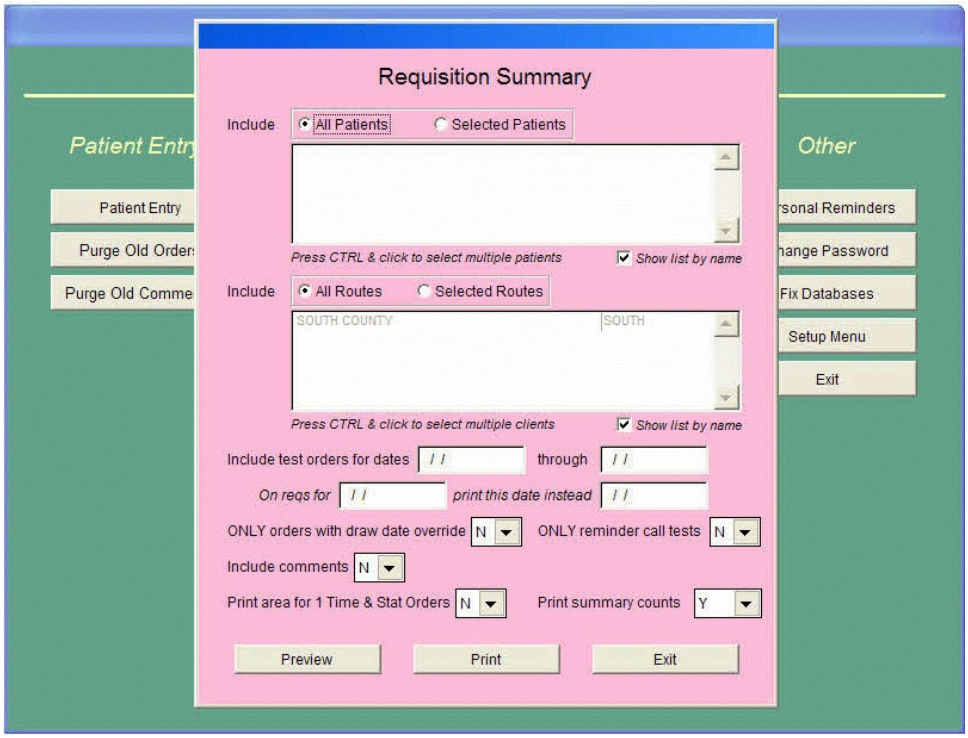
printed with the substitute draw date instead.

Notes For patients with an entry in the Medicare # field, the requisition will include an 'Advanced Beneficiary Waiver Notice', as required by Medicare.

When a substitute date is printed, only the requisitions are affected. The patient’s test order will still show the original draw date.

REQUISITION SUMMARY

Location Main Menu ➠
Requisition Summary



Prompts

All or Selected Patients	If only specific patients are to be printed, choose 'Selected Patients' and highlight one or more desired patients.
All or Selected Routes	If only specific phlebotomy routes are to be printed, choose 'Selected Routes' and highlight one or more desired routes.
Only Orders With Draw Date Override	Choose 'Y' to only include only orders which override the normal draw days for the phlebotomy route.
Only Reminder Call Tests	Choose 'Y' to include only orders for tests where a reminder call has been specified in the master test setup.

Include Test Orders for Dates	Enter the first and last dates for which orders are to be printed.
On Reqs for ... Print This Date Instead	To print a substitute date for a specific date, enter the date to be changed and the substitute date. This allows requisitions which fall on a holiday to be printed with the substitute draw date instead.
Include Comments	Choose 'Y' to include patient comments on the report.
Print Area for 1 Time and Stat Orders	Choose 'Y' to include an area near the bottom of the report for recording 'last minute' orders. (Note that this option is not available if format #5 or #6 is selected on the Set Preferences screen.)
Print summary counts	Choose 'Y' to print a report showing the number of patients drawn by date, by client. The summary report will appear at the end of the patient detail report. Choose 'N' to skip the summary report or 'ONLY' to print only the summary without the patient detail.

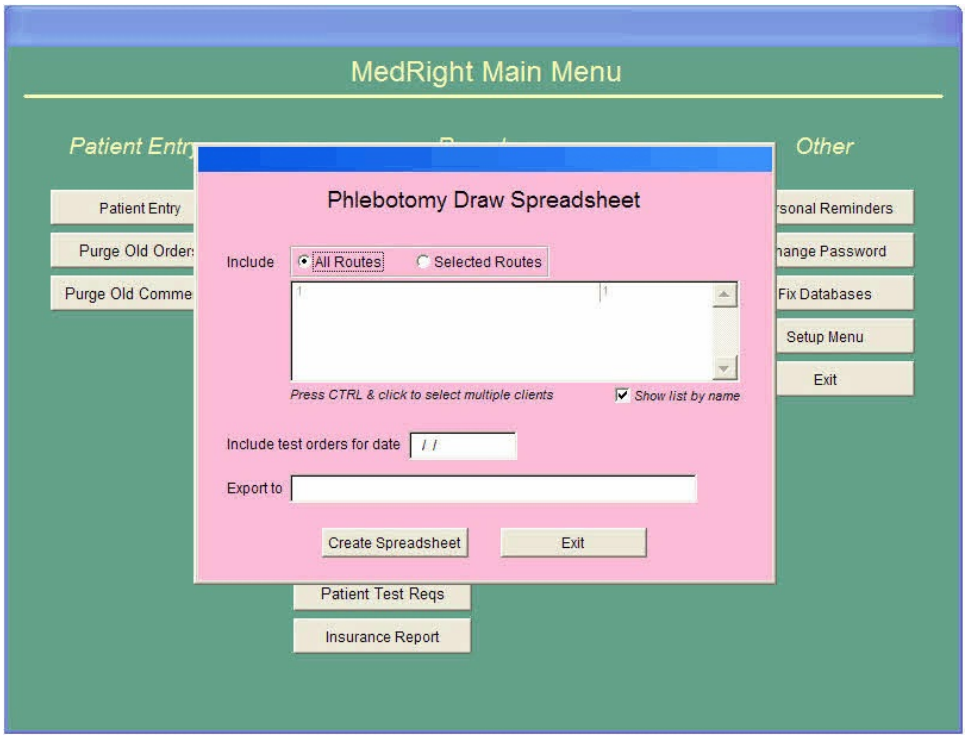
Notes

The Requisition Summary is a companion report to the scheduled test requisitions.

When a substitute date is printed, only the requisitions are affected. The patient's test order will still show the original draw date.

SCHEDULED DRAW SPREADSHEET

Location Main Menu ➠
Sched Draw Spreadsheet



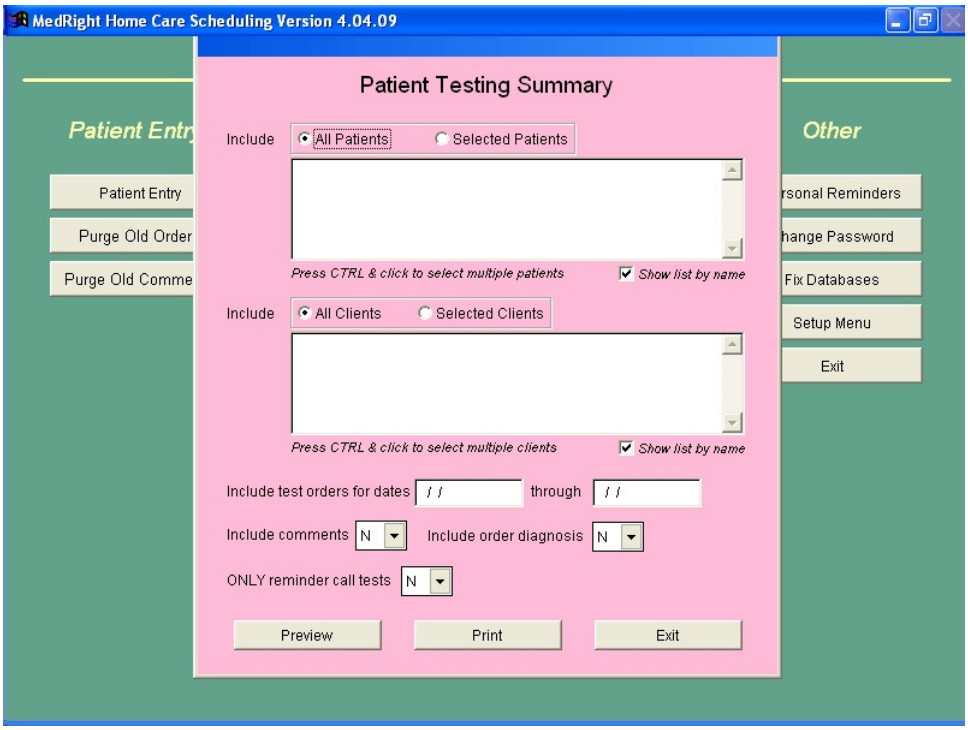
Prompts

All or Selected Routes	If only specific phlebotomy routes are to be printed, choose 'Selected Routes' and highlight one or more desired routes.
Include Test Orders for Dates	Enter the date for which orders are to be exported.
Export To	Enter the desired Excel file name

Notes

TESTING SUMMARY

Location Main Menu ➠
Testing Summary



Prompts

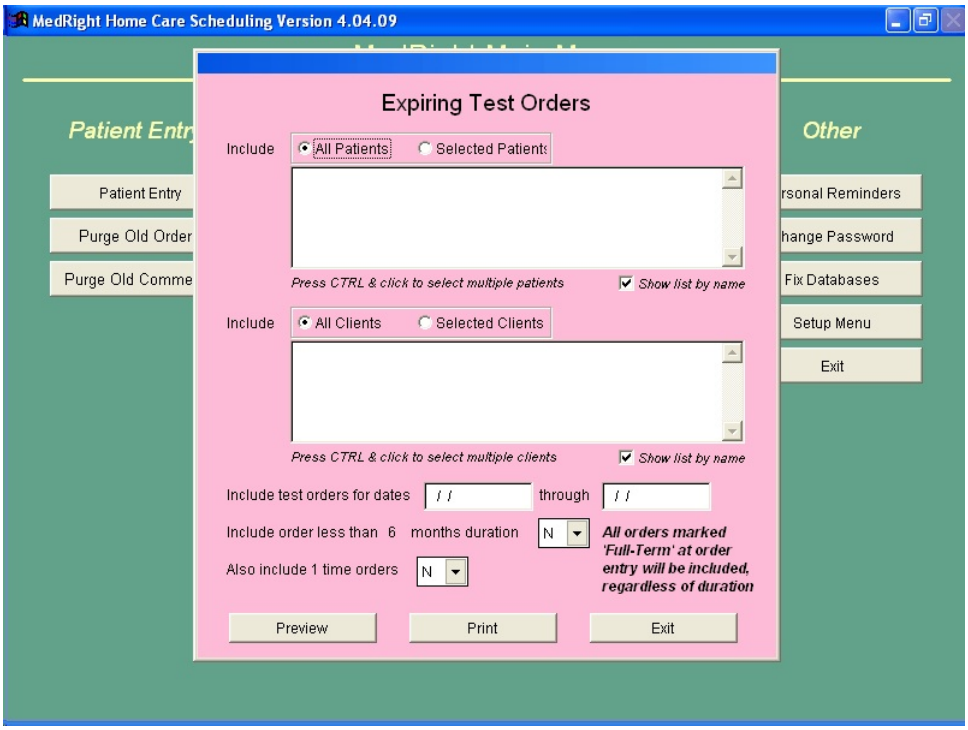
All or Selected Patients	If only specific patients are to be printed, choose 'Selected Patients' and highlight one or more desired patients.
All or Selected Clients	If only specific clients are to be printed, choose 'Selected Clients' and highlight one or more desired clients.
Include Test Orders for Dates	Enter the first and last dates for which orders are to be printed.
Include Comments	Choose 'Y' to include patient comments on the report.
Include Diagnosis	Choose 'Y' to include the diagnosis which supports the test order.

Only Reminder Call Tests	Choose ‘Y’ to include only orders for tests where a reminder call has been specified in the master test setup.

Notes

EXPIRING TEST ORDERS

Location Main Menu ➠
Expiring Test Orders



Prompts

All or Selected Patients	If only specific patients are to be printed, choose 'Selected Patients' and highlight one or more desired patients.
All or Selected Clients	If only specific clients are to be printed, choose 'Selected Clients' and highlight one or more desired clients.
Include Test Orders for Dates	Enter the first and last dates for which requisitions are to be printed.
Include Test Orders Less ...	Choose 'Y' to include testing which was not ordered for the maximum duration allowed by the Medicare compliance setting.
Include 1 Time Orders	Choose 'Y' to include 1 time orders, otherwise choose 'N'.

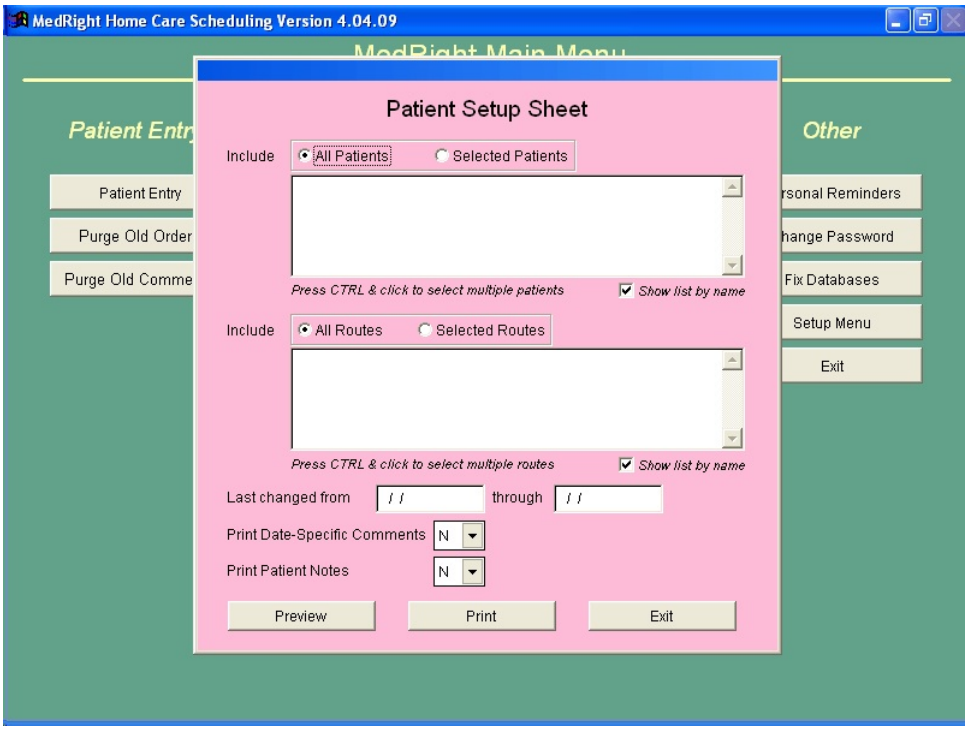
Notes Both report and letter formats are available.

Test orders entered with the ‘Full Term’ box checked will always be included, if the order’s end date falls with the specified date range.

Test orders which have been reinstated are automatically excluded from this report by ***MedRight.***

PATIENT SETUP SHEET

Location Main Menu ➠
Setup Sheet



Prompts

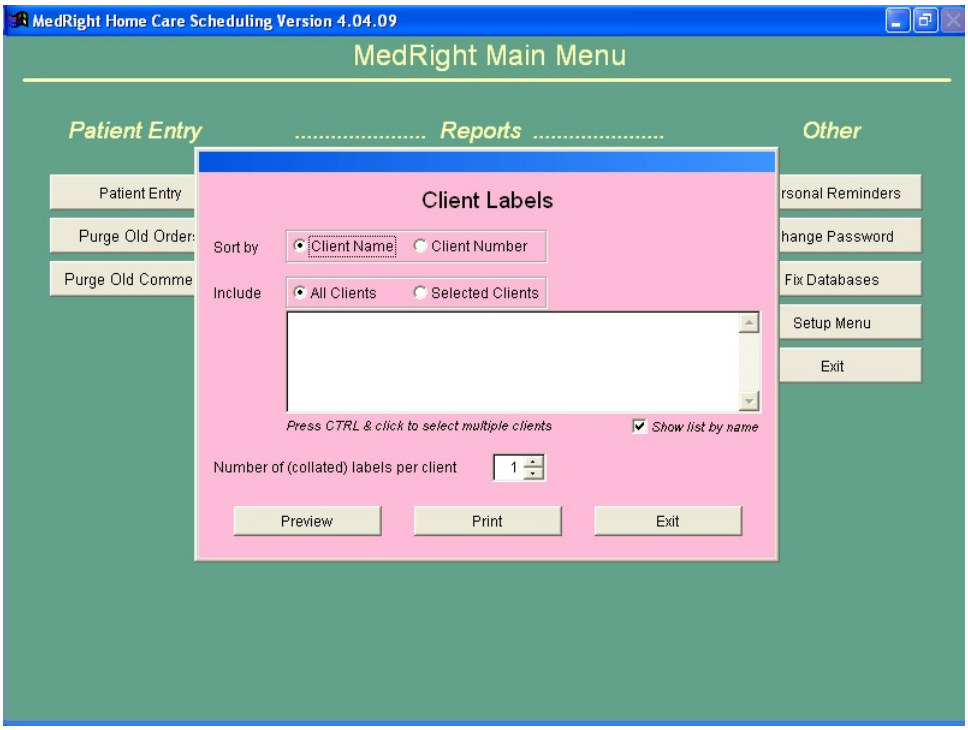
All or Selected Patients	If only specific patients are to be printed, choose 'Selected Patients' and highlight one or more desired patients.
All or Selected Routes	If only specific phlebotomy routes are to be printed, choose 'Selected Routes' and highlight one or more desired routes.
Last Changed From	To limit printing to only those patients whose information was updated within a particular period of time, enter the start and end dates. Otherwise, leave blank.

Print Date-Specific Comments	Choose ‘Y’ to include all date-specific comments which have been entered for the patient.
Print Patient Notes	Choose ‘Y’ to include all notes which have been entered for the patient.

Notes

CLIENT LABELS

Location Main Menu ➠
Client Labels



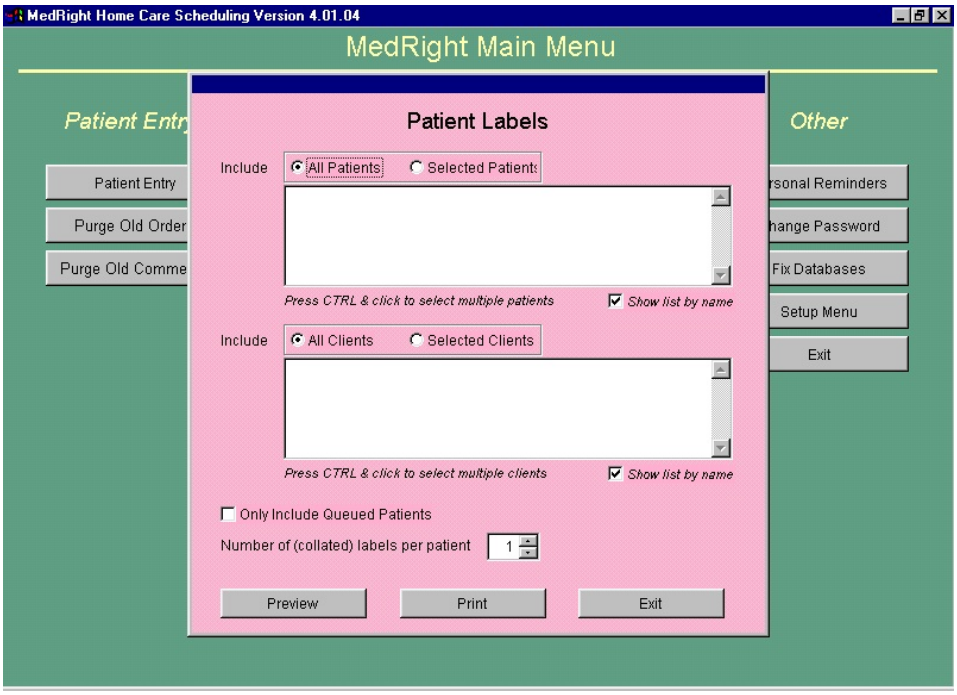
Prompts

Sort By ...	Choose desired sort order.
All or Selected Clients	If only specific clients are to be printed, choose 'Selected Clients' and highlight one or more desired clients.
Number of labels Per Client	Choose the desired number of labels for each client.

Notes ***MedRight*** uses a label format compatible with the Avery #5160.

PATIENT LABELS

Location Main Menu ➠
Patient Labels



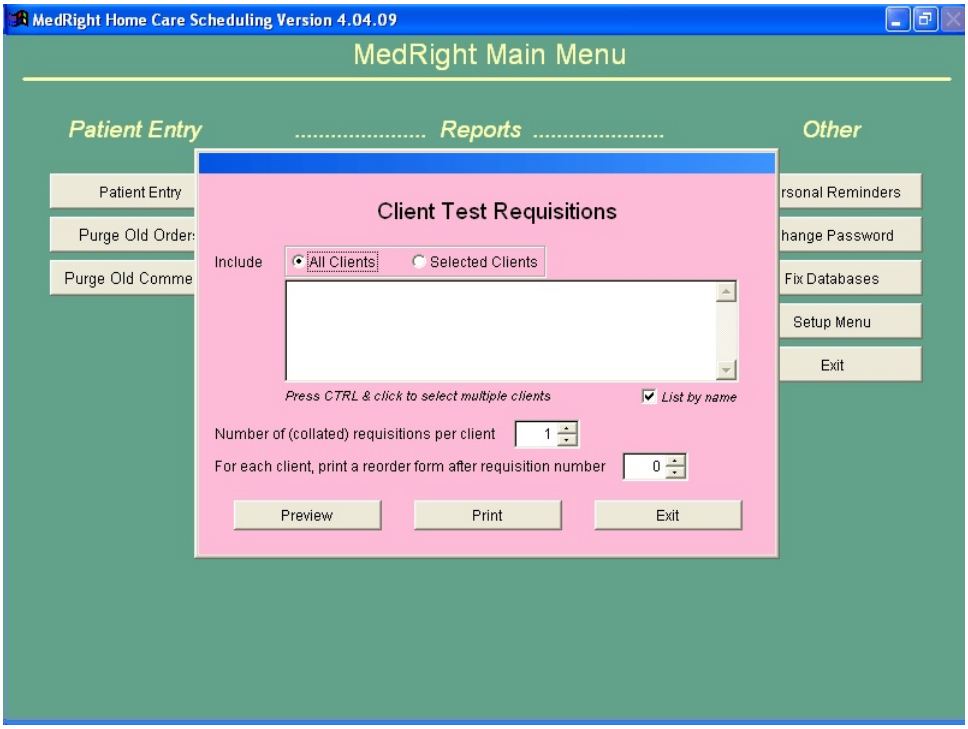
Prompts

All or Selected Patients	If only specific patients are to be printed, choose 'Selected Patients' and highlight one or more desired patients.
All or Selected Clients	If only specific clients are to be printed, choose 'Selected Clients' and highlight one or more desired clients.
Only Include Queued Patients	Choose 'Y' to include only patients which have been added to the label que.
Number of labels Per Patient	Choose the desired number of labels for each patient.

Notes ***MedRight*** uses a label format compatible with the Avery #5160.

CLIENT REQUISITIONS
One-Time and Stat Tests

Location Main Menu ➠
Client Test Reqs



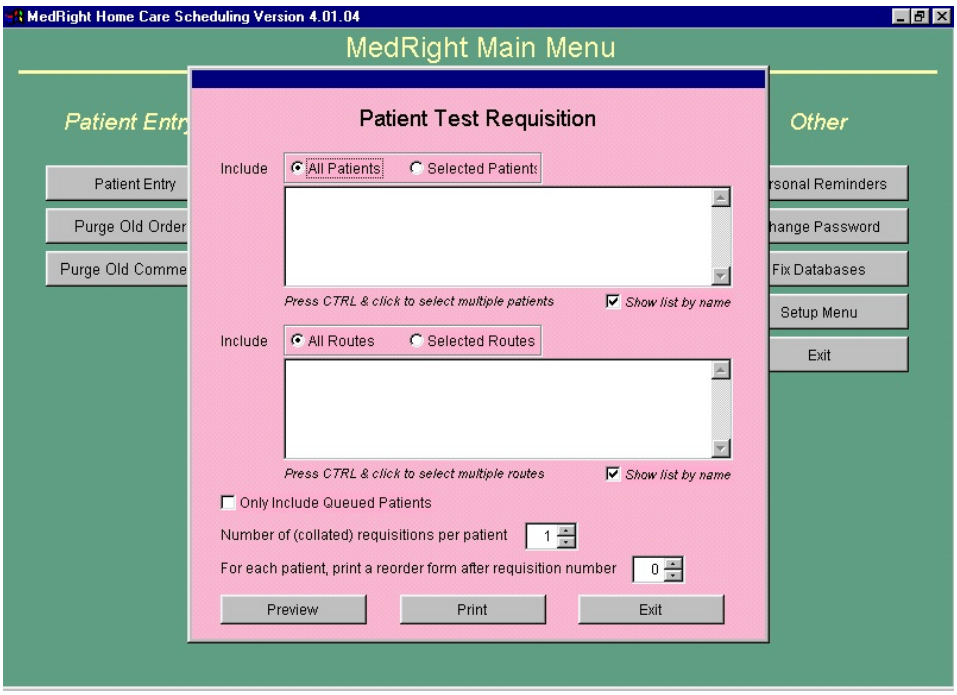
Prompts

All or Selected Clients	If only specific clients are to be printed, choose 'Selected Clients' and highlight one or more desired clients.
Number of requisitions Per Client	Choose the desired number of requisitions each client.
Print Reorder Form After Requisition Number	A convenient reorder form may be inserted automatically into the stack of requisitions for the client. If desired, indicate the number of the requisition after which the form is to be printed.

Notes

PATIENT REQUISITIONS
One-Time and Stat Tests

Location Main Menu ➠
Patient Test Reqs



Prompts

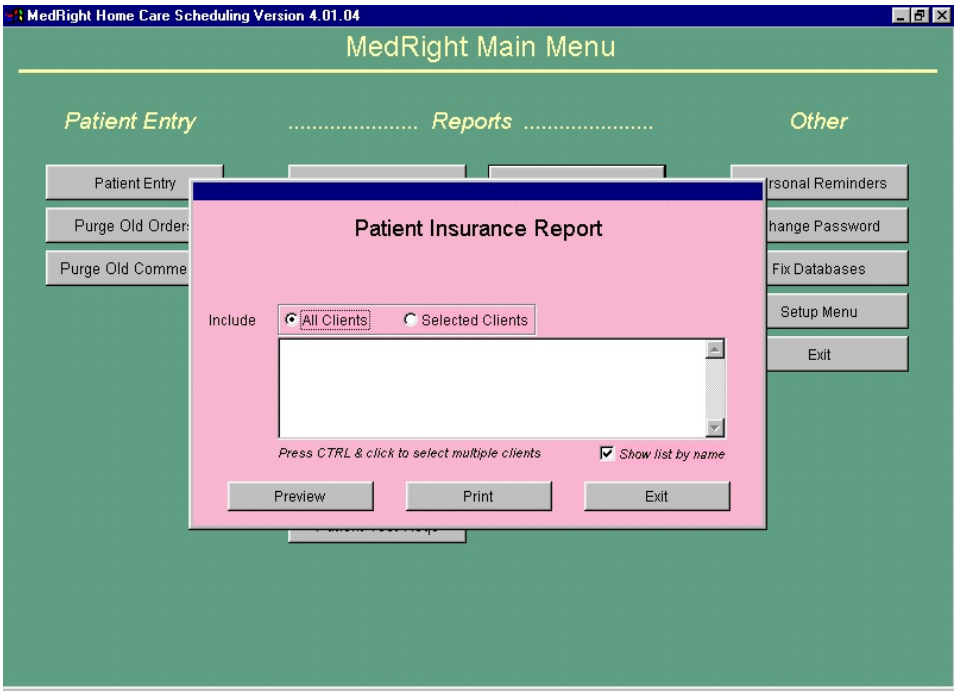
All or Selected Patients	If only specific patients are to be printed, choose 'Selected Patients' and highlight one or more desired patients.
All or Selected Routes	If only specific phlebotomy routes are to be printed, choose 'Selected Routes' and highlight one or more desired routes.
Only Include Queued Patients	Choose 'Y' to include only patients which have been added to the requisition que.
Number of requisitions per Patient	Choose the desired number of requisitions for each patient.
Print Reorder Form After Requisition Number	A convenient reorder form may be inserted automatically into the stack of requisitions for the patient. If desired,

indicate the number of the requisition after which the form is to be printed.

Notes

PATIENT INSURANCE REPORT

Location Main Menu ➠
Insurance Report

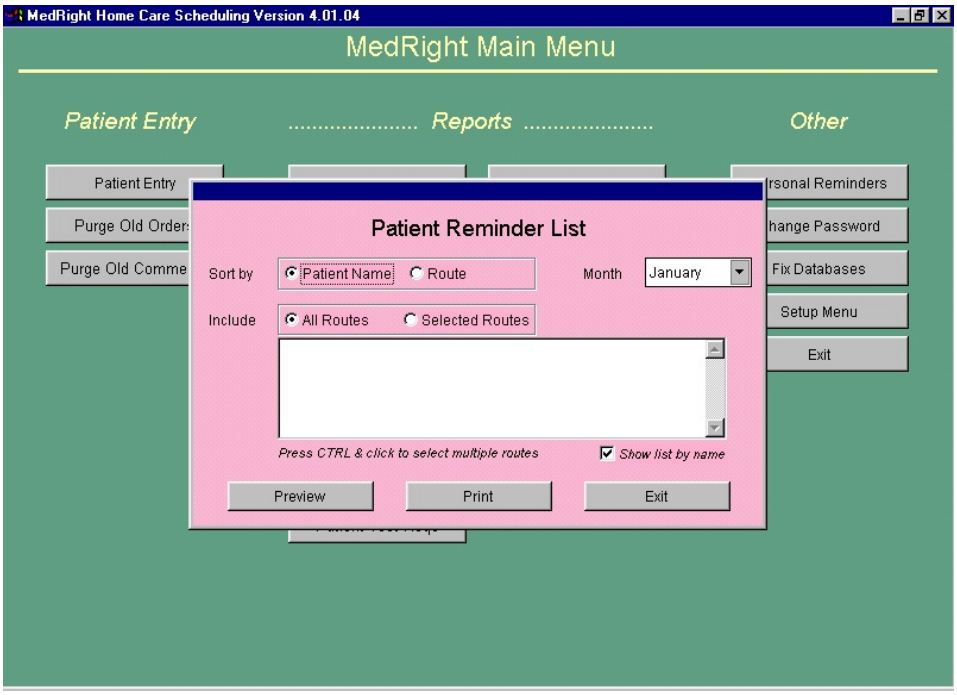


Prompts All or Selected Clients — If only specific clients are to be printed, choose 'Selected Clients' and highlight one or more desired clients.

Notes

PATIENT REMINDER LIST

Location Main Menu ➠
Reminder List



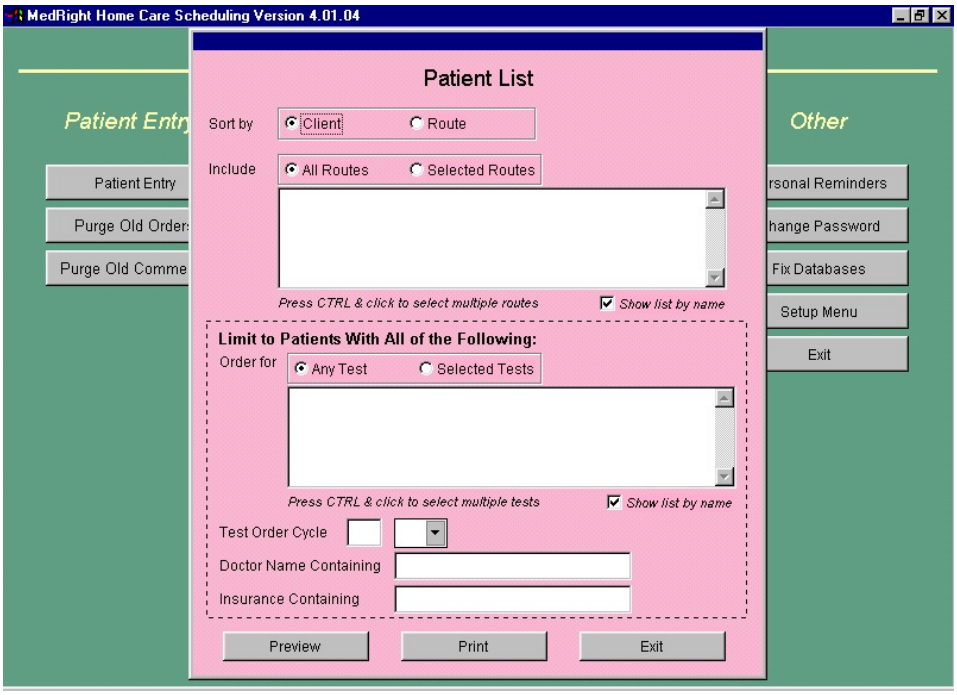
Prompts

Sort By...	Choose the desired sort order.
Patient Reminder Month	Choose the month for which patients should be included.
All or Selected Routes	If only specific phlebotomy routes are to be printed, choose ‘Selected Routes’ and highlight one or more desired routes.

Notes

MASTER PATIENT LIST

Location Main Menu ➠
Patient List



Prompts

Sort By...	Choose the desired sort order.
All or Selected Patients	If only specific patients are to be printed, choose 'Selected Patients' and highlight one or more desired patients.
All or Selected Routes	If only specific phlebotomy routes are to be printed, choose 'Selected Routes' and highlight one or more desired routes.
Limit to Patients With ...	
Order For	Choose one or more tests to limit patients to be printed to only those with an order for the specified tests.
Test Order Cycle	Enter a test cycle to limit patients to only those containing one or more test orders with that cycle.
Doctor Name	Enter a name to limit patients to only

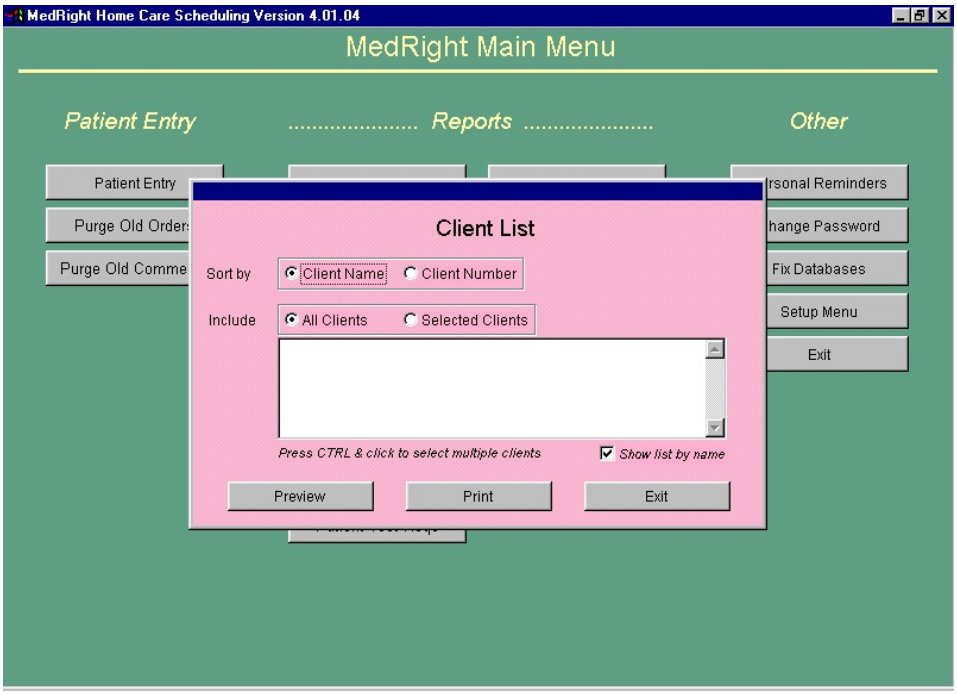
Containing	those where the specified characters exist in the physician name field.
Insurance Containing	Enter insurance information to limit patients to only those where the specified characters exist in any of the Medicare, Medicaid, or private insurance fields.

Notes In addition to the patient number, name, location, and physician name, the report identifies the patient's test order status:

ACT	One or more active orders exist
EXP	All test orders have expired
NO	No test orders exist for the patient

MASTER CLIENT LIST

Location Main Menu ➠
Client List



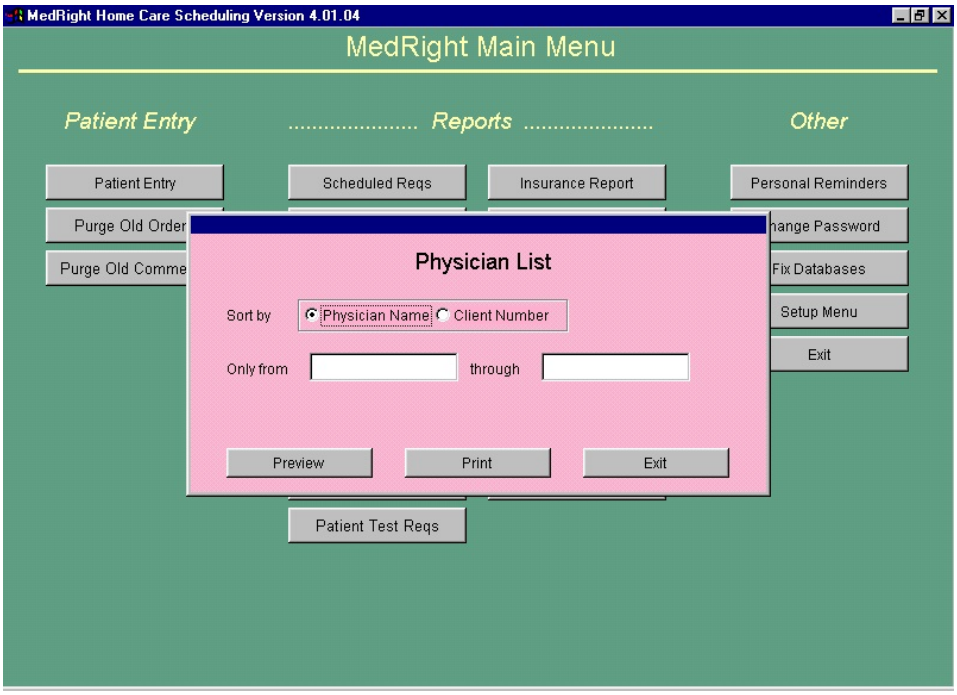
Prompts

Sort By...	Choose the desired sort order.
All or Selected Clients	If only specific clients are to be printed, choose ‘Selected Clients’ and highlight one or more desired clients.

Notes

MASTER PHYSICIAN LIST

Location Main Menu ➠
Physician List



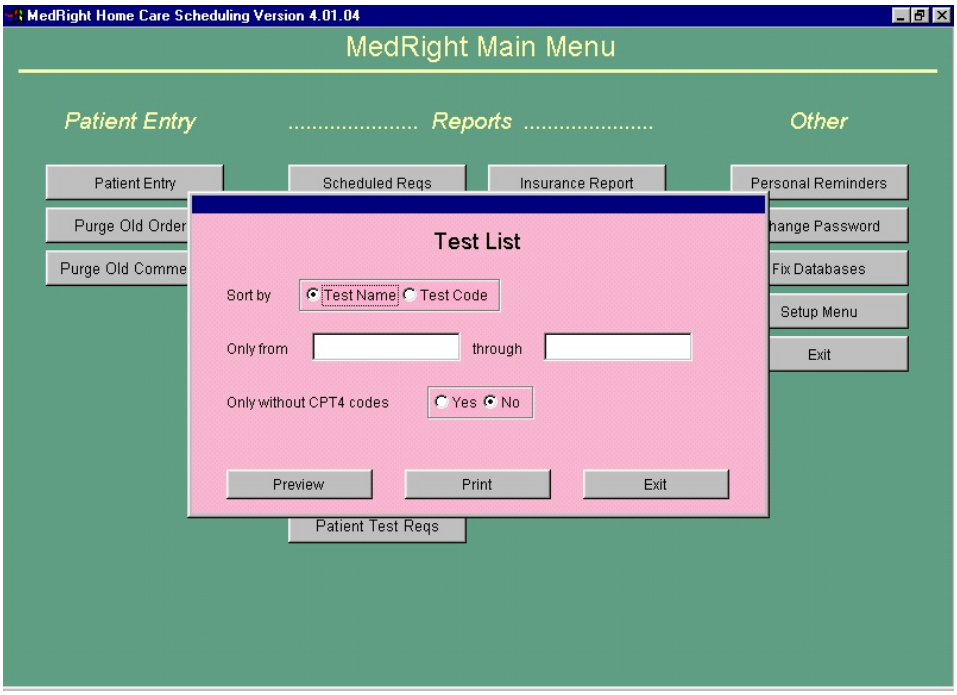
Prompts

Sort By...	Choose the desired sort order.
Only From ... Through	To limit the report to a range of clients/names, enter starting and ending clients/names.

Notes

MASTER TEST LIST

Location Main Menu ➠
Test List



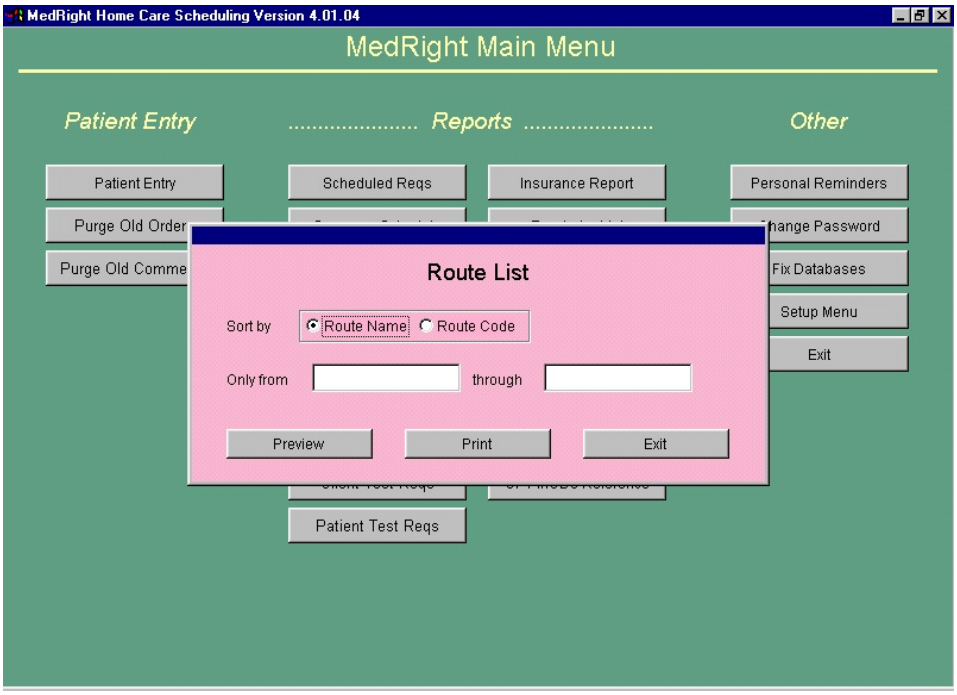
Prompts

Sort By...	Choose the desired sort order.
Only From ... Through	To limit the report to a range of names/codes, enter starting and ending names/codes.
Only without CPT4 Code	Choose 'Y' to include only tests where no CPT4 codes have been entered.

Notes

MASTER PHLEBOTOMY ROUTE LIST

Location Main Menu ➠
Route List



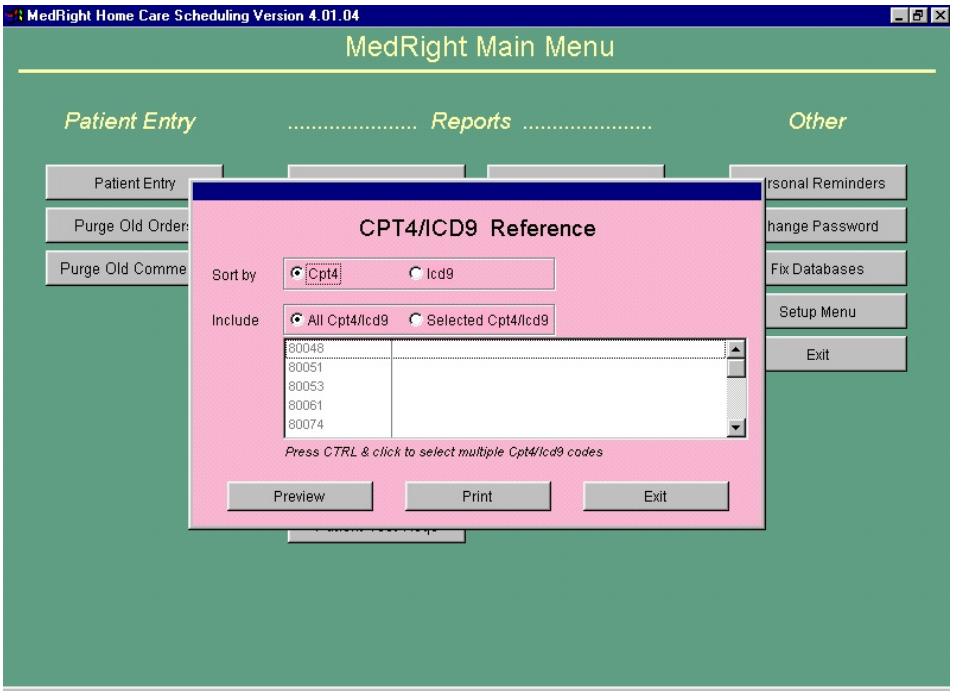
Prompts

Sort By...	Choose the desired sort order.
Only From ... Through	To limit the report to a range of names/codes, enter starting and ending names/codes.

Notes

CPT4/ICD9 CROSS REFERENCE

Location Main Menu ➠
CPT4/ICD9 Reference



Prompts

Sort By...	Choose desired sort order.
All or Selected CPT4/ICD9	If only specific CPT4/ICD9s are to be printed, choose ‘Selected CPT4/ICD9’ and highlight one or more desired entries.

Notes

UTILITIES

The ***MedRight Home Care Scheduling System*** contains useful utilities to facilitate your personal time management. In addition, a facility is provided to assist in repairing damaged databases.

Personal Reminders - Allows the entry of a list of important dates and their related notes. ***MedRight*** checks this information whenever started to ensure that important dates aren't forgotten.

Change Password - Allows user access password to be modified.

Fix Databases - Causes the ***MedRight Home Care Scheduling System*** to review the information in its databases and effect simple repairs.

Purge Client - Allows all of the patients for a client to be purged from the database in one easy step.

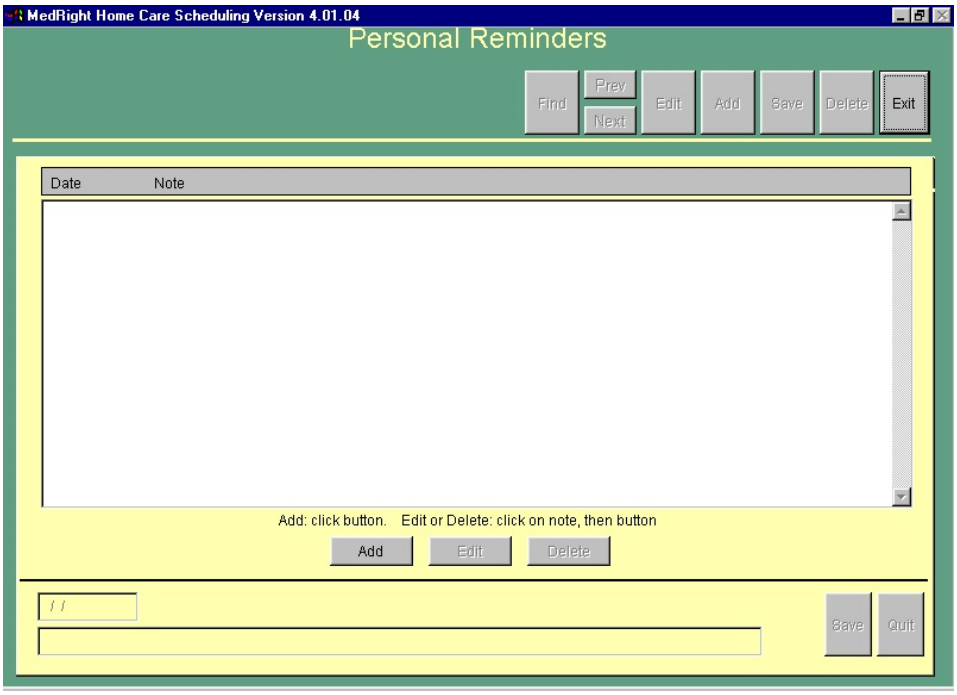
Extract Client - For the specified client, copies the patient demographic, billing, test order, and date-specific comment information entered into ***MedRight*** to a series of files for transfer to another computer's ***MedRight Home Care Scheduling System.***

Merge Client - Allows patient information which was extracted from another ***MedRight Home Care Scheduling System*** to be transferred into the patient database.

Update Nursing Home System - Provides a convenient means to replace the physician, test, medical necessity, and/or ICD9 information in a ***MedRight Nursing Home Scheduling*** system with the information contained in this system.

ADD or CHANGE PERSONAL REMINDERS

Location Main Menu ➠
Personal Reminders



To add a new reminder, click ADD. To edit or delete a reminder, click on the reminder in the displayed list, then click the desired action (EDIT, DELETE).

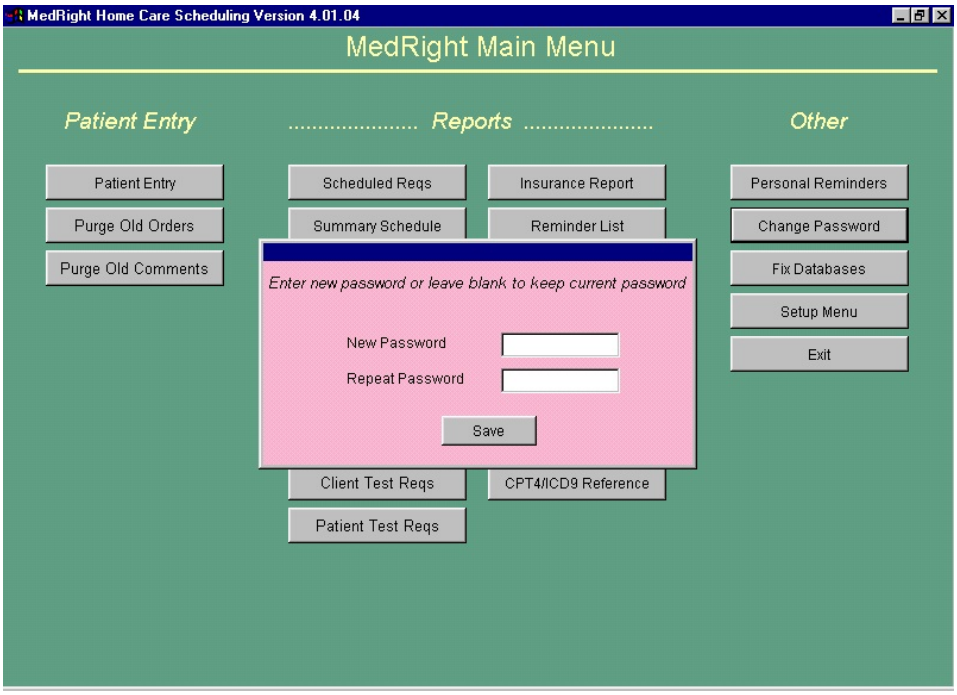
Prompts

Date	Enter the date you wish to be reminded.
Note	Enter key notes, tasks, etc related to the date.

Notes

CHANGE USER ACCESS PASSWORD

Location Main Menu ➠
Change Password



Prompts

New Password	Enter a 3-6 character password, consisting of any characters on the keyboard. Note that alphabetic characters are not case-sensitive and automatically converted to upper-case.
Repeat Password	Enter the new password again. This password must match that entered above.

Notes A message is displayed indicating whether the password was updated.

FIX DATABASES

Location Main Menu ➠
Fix Databases

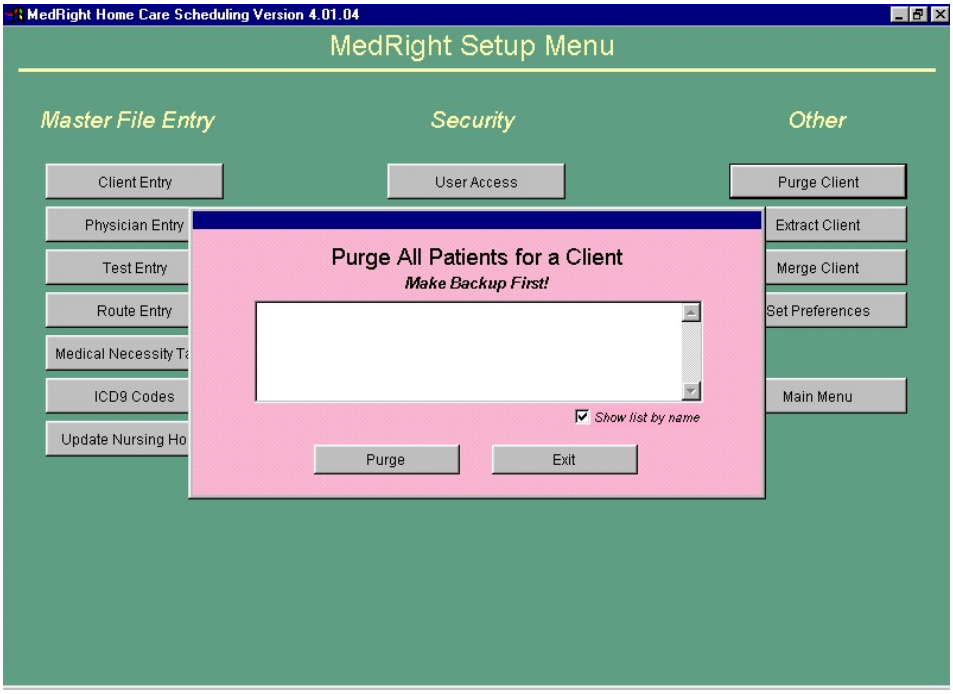
Prompts

Notes Fixing the databases can never 'harm' the database and can be performed as desired without danger.

This option will also repair a variety of database problems.

PURGE ALL PATIENT INFORMATION FOR A CLIENT

Location Main Menu ➠
Setup Menu ➠
Purge Client



Prompts Client — Select the desired client from the list.

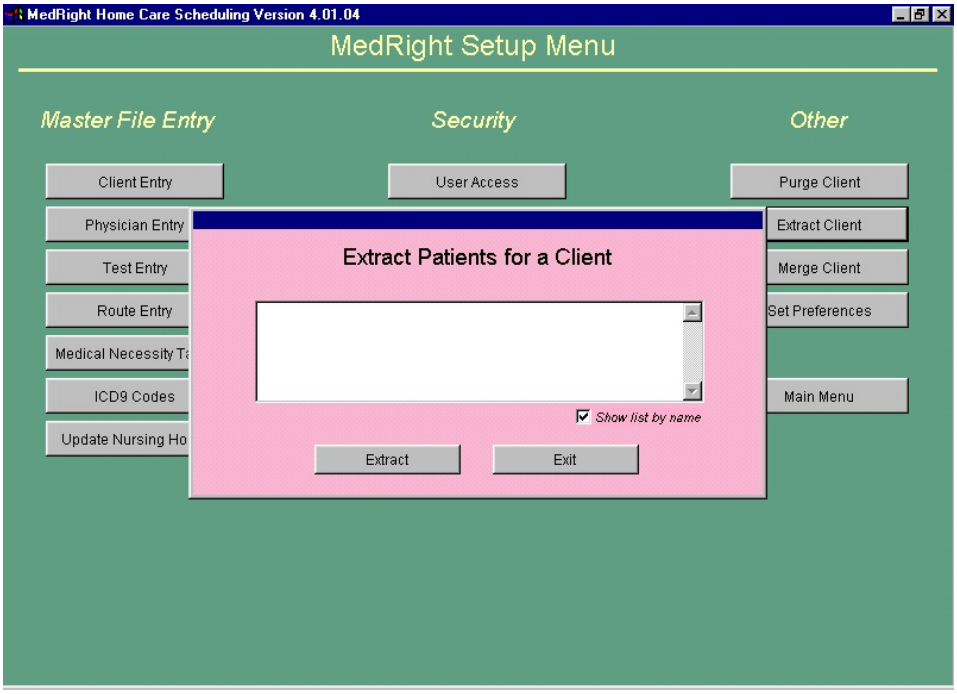
Notes This option purges ALL patient information for the selected client.

For added protection, first create a copy of the patient information using the 'Extract Client' option. Purged information cannot be recovered!

IT IS STRONGLY RECOMMENDED THAT A BACKUP OF THE SYSTEM BE MADE PRIOR TO MERGING PATIENT INFORMATION.

EXTRACT ALL PATIENT INFORMATION FOR A CLIENT

Location Main Menu ➠
Setup Menu ➠
Extract Client



Prompts

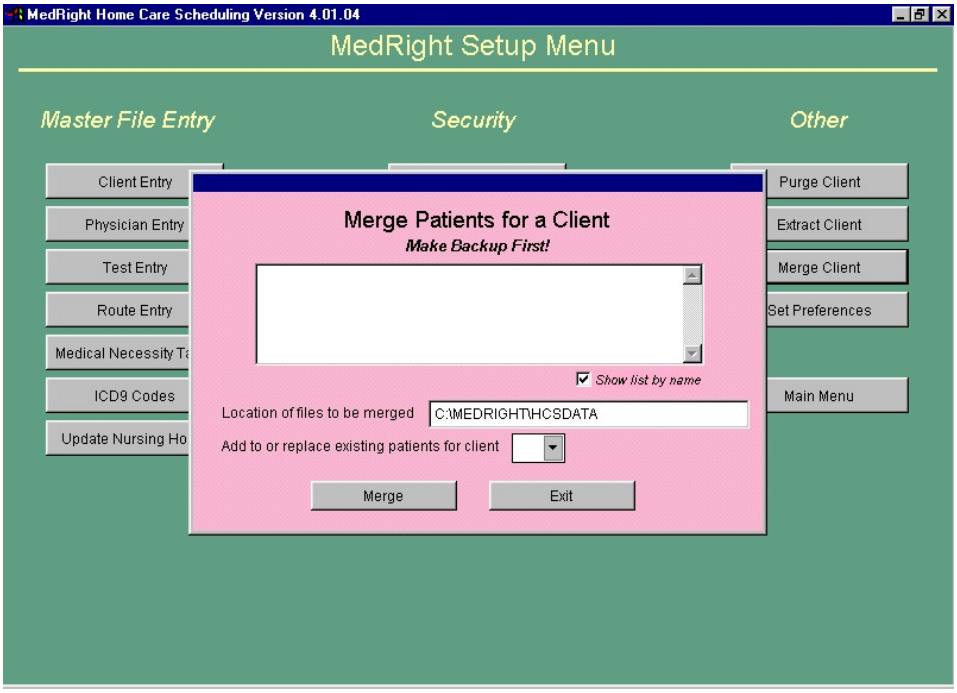
Client	Select the desired client from the list.
Copy Extracted Data to	Enter the path of the folder where the extracted files should be placed.

Notes The extract function does not remove the patients from ***The MedRight Home Care Scheduling System***. Rather, it simply copies the patient demographic, billing, test order, and date-specific comment information to a series of files. The file names and location are displayed when processing is completed. The original patient information remains intact.

The extracted patient information is stored in a series of 4 files. All 4 files are required to merge the patients into another ***MedRight*** system.

MERGE ALL PATIENT INFORMATION FOR A CLIENT

Location Main Menu ➠
Setup Menu ➠
Merge Client



Prompts

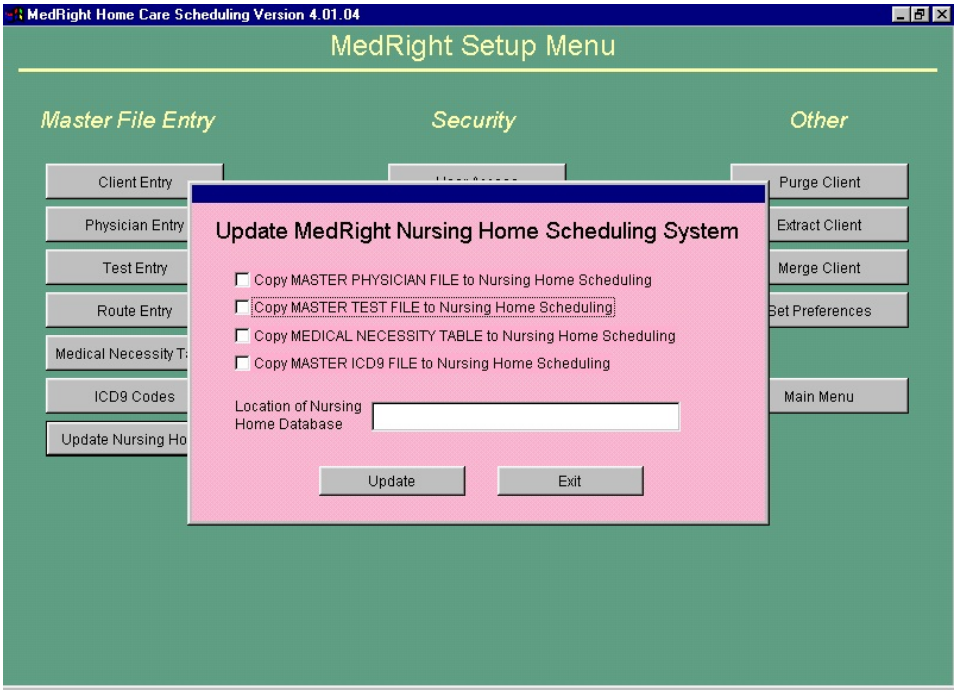
Client	Select the desired client from the list.
Location of Files to be Merged	Enter the path of the folder containing the 4 files created by the Extract Client function.
Add or Replace	Choose 'A' to add the extracted patients the existing patients for the client. *See warning note below!* Choose 'R' to delete the existing patients for the client and replace them with the patients contained in the previously extracted files.

Notes If the ‘Add’ option is selected, it is possible for a patient may appear in the database more than 1 time, as the previously extracted information is simply appended to the existing database. This may result in patient maintenance problems. If this option is selected, ensure that none of the patients contained in the previously extracted files also exist in the current database.

IT IS STRONGLY RECOMMENDED THAT A BACKUP OF THE SYSTEM BE MADE PRIOR TO MERGING PATIENT INFORMATION.

UPDATE *MedRight Nursing Home Scheduling* MASTER FILES

Location Main Menu ➠
Setup Menu ➠
Update Nursing Home



Prompts

Copy MASTER TEST ... Check this box to replace the nursing home scheduling system's master test information with this system's information.

Copy MASTER PHYS ... Check this box to replace the nursing home scheduling system's master physician information with this system's information.

Copy MEDICAL NEC ... Check this box to replace the nursing home scheduling system's medical necessity table with this system's information.

Copy MASTER ICD9 ... Check this box to replace the nursing home scheduling system's master ICD9

	information with this system's information.
Location of Home Care Database	Enter the path of the folder containing the ***MedRight Home Care*** system database.

Notes This function completely replaces the selected information in the ***MedRight Nursing Home Scheduling*** database with that from the ***MedRight Home Care Scheduling*** database.

SYSTEM PROBLEM NOTE

At what date & time did the problem occur?

What menu option was being performed?

What was the problem - Be Specific?

What error messages appeared on the screen or printer?

Was a specific client, patient, or test affected? Which one(s)?

What did you do to resolve the problem?

SCHEDULING SYSTEM BACKUP LOG

Date & Time	*By Whom*	*Backup Set*	*Type*	*Notes*
_____	_____	_____	*Partial* *Full*	_____
_____	_____	_____	*Partial* *Full*	_____
_____	_____	_____	*Partial* *Full*	_____
_____	_____	_____	*Partial* *Full*	_____
_____	_____	_____	*Partial* *Full*	_____
_____	_____	_____	*Partial* *Full*	_____
_____	_____	_____	*Partial* *Full*	_____
_____	_____	_____	*Partial* *Full*	_____
_____	_____	_____	*Partial* *Full*	_____
_____	_____	_____	*Partial* *Full*	_____
_____	_____	_____	*Partial* *Full*	_____
_____	_____	_____	*Partial* *Full*	_____
_____	_____	_____	*Partial* *Full*	_____
_____	_____	_____	*Partial* *Full*	_____

NOTE! To provide added protection, a backup should be removed from the laboratory at least once per week.

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